



Core Unit 4

Financing and Investing for Retirement Provision

Mock Examination

Recommended Time: 1 hour

1. What is tactical asset allocation?
5 marks

2. Define the term discount rate.
5 marks

3. What is inflation risk and how can it be mitigated?
10 marks

4. Write short notes on the nature of the annual report of an Independent Governance Committee.
5 marks

5. Outline the features of a lifestyle investment strategy.
10 marks

6. Outline the considerations relevant to an assessment of employer covenant.
10 marks

7. Identify 5 factors that influence an individual's contributions to a defined contribution arrangement.
5 marks