

PMI

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Core Unit 3 – Running a Workplace Pension Scheme

Assignment 2

# (Part 3 – Benefits and Communication)

*Recommended Time: 1 Hour*

1. List the information that is typically required from a transferring arrangement when a transfer in takes place

**10 marks**

1. Write a short note on the checks required by HMRC when paying a relevant lump sum death benefit.

**10 marks**

1. Explain the difference between an earmarking order and pension sharing.

**5 Marks**

1. List the functions of a scheme actuary.

**5 marks**

1. Briefly explain the key features of an uncrystallised funds pension lump sum (UFPLS).

**5 marks**

1. List the key disclosure requirements that schemes must satisfy so that they do not breach the disclosure regulations

**10 marks**

1. List the various paperwork that is required to set up an annuity

**5 marks**