Core Unit 3 – Running a Workplace Pension Scheme

Assignment 4

# (Part 5 – Treasury Management)

*Recommended Time: 1 Hour*

1. List the information that is included in the trustees’ report and accounts.

 **10 marks**

1. List the types of pension arrangements that are covered and excluded by the Statement of Recommended Practice.

 **10 marks**

1. List the various lump sum death benefits and explain the amount of tax payable.

 **10 marks**

1. List the various records that must be retained by pension schemes in the operation of a pension scheme bank account.

 **5 marks**

1. Outline the tasks that must be covered when setting up a pensioner payroll.

 **5 marks**

1. Write a short note explaining Real Time Information.

 **10 marks**