

## Sample 12 week Study Plan for J02 Trusts using the 3 products available from Wizard Learning

Wizard Learning provides three different products to help student pass the J02 exam. This sample study plan aims to help students create their own study plan using some or all of our products.

See <http://www.wizardlearning.com/accounts.php?action=list> for details of the three J02 Wizard Learning products.

### PART 1 Focusing on Wizard Learning's J02 online course

Week Number	Method	Subject	Syllabus learning outcome	Test score	Study hours
1	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 1 - Introduction to trusts	1. To understand the structure of a trust and the role of the settlor, trustee and beneficiaries		3.5 hours
1	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 2 - Trust creation, rules and uses	2. To understand how trusts are created, the rules that govern them and their main uses		1.5 hours
2	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 3 - Investment and administration of trusts	3. To understand the rules covering the investment of trust assets and the administration of trusts		1.5 hours
2	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 4 - Powers of attorney	4. To understand substituted decision making, the impact of loss of mental capacity and related procedures		2 hours

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2	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 5 - Wills and intestacy	5. To understand the consequences of making a will and of dying intestate		2 hours
3	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 6 - Bankruptcy	6. To understand the rules relating to bankruptcy and the role of the trustee in bankruptcy		2 hours
3	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 7 - Taxation of trusts	7. To understand how trusts are subject to tax and how a liability can fall to the settlor, trustees or beneficiaries		3.5 hours
4	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 8 - Life assurance and pensions in trusts	8. To understand how life assurance policies and certain pension benefits can be placed in trust and the tax and other implications		3.5 hours
4	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 9 - Reviewing trusts	9. To understand the need to review trusts regularly		1 hour

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5	50 question final revision assessment	All chapters	1 - 9		1 hour
5	Case study incorporating 20 multiple choice questions	All chapters	1 - 9		1 hour
5	Final assessment 1	All chapters	1 - 9		0.5 hours
6	Final assessment 2	All chapters	1 - 9		0.5 hours
6	Revision reading focusing on weaknesses identified in assessments and case study	All chapters	1 - 9		3.5 hours
<b>Sub total for part 1: 27 hours</b>					

## PART 2 Focusing on the Wizard Learning's J02 subject knowledge questions

<b>Week Number</b>	<b>Method</b>	<b>Subject</b>	<b>Syllabus learning outcome</b>	<b>Test score</b>	<b>Study hours</b>
7	50 question assessment 1	All chapters	1 - 9		1 hour
7	50 question assessment 2	All chapters	1 - 9		1 hour
7	Revision reading	Chapters 1 and 2 of online course plus weaknesses identified in assessments 1 & 2	1 - 2		3 hours
8	50 question assessment 3	All chapters	1 - 9		1 hour
8	50 question assessment 4	All chapters	1 - 9		1 hour
8	Revision reading	Chapters 3, 4 & 5 of online course plus weaknesses identified in assessments 3 & 4	3 - 5		3 hours
9	50 question assessment 5	All chapters	1 - 9		1 hour
9	50 question assessment 6	All chapters	1 - 9		1 hour
9	Revision reading	Chapters 6 & 7 of online course plus weaknesses identified in assessments 5 & 6	6 - 7		3 hours
9	Random short assessments	All chapters	1- 9		3 hours
10	Revision reading	Chapters 8 & 9 of online course plus weaknesses identified in the random assessments	8 - 9		3 hours
10	Random short assessments	All chapters	1- 9		3 hours
10	Revision reading	Sections in the online course where weaknesses identified	1- 9		4 hours
<b>Sub total for part 2: 28 hours</b>					

## PART 3 Focusing on the Wizard Learning's J02 practice exam package

<b>Week Number</b>	<b>Method</b>	<b>Subject</b>	<b>Syllabus learning outcome</b>	<b>Test score</b>	<b>Study hours</b>
11	Self marked practice exam	All chapters	1 – 9		2 hours
11	Case study 1	Chapters 4 and 5	4-5		2 hours
11	Assessor marked practice exam	All chapters	1 – 9		2 hours
11	Revision reading	Sections in the online course where weaknesses identified	1- 9		4 hours
12	Case study 2	Chapter 6	6		2 hours
12	Case study 3	Chapters 2,3 and 8	2,3 and 8		2 hours
12	Final revision reading	All chapters with a focus on the sections in the online course where weaknesses identified	1- 9		6 hours
<b>Sub total for part 3: 20 hours</b>					
<b>Total for part 1 to 3: 75 hours</b>					

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