

## Sample 12 week Study Plan for J04 Pension funding options using the 3 products available from Wizard Learning

Wizard Learning provides three different products to help student pass the J04 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 J04 Wizard Learning products.

### PART 1 Focusing on Wizard Learning's J04 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 – Current pensions issues	7. To understand the key issues in pension accumulation		1 hour
1	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 2 – HMRC Rules Part 1	1. Understand the HM Revenue and Customs (HMRC) tax regime for pensions with particular reference to the accumulation of retirement funds		2 hours
1	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 3 – HMRC Rules Part 2	1. Understand the HM Revenue and Customs (HMRC) tax regime for pensions with particular reference to the accumulation of retirement funds		2 hours

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2	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 4 – Legacy issues and transitional protection	1. Understand the HM Revenue and Customs (HMRC) tax regime for pensions with particular reference to the accumulation of retirement funds		2 hours
2	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 5 – State pension benefits	2. Understand the State retirement benefits available, including the risks and suitability of contracting out of the State Second Pension		2 hours
3	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 6 – Individual pensions	4. Understand the features of defined contribution pension schemes		2 hours
3	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 7 – Occupational defined contribution pension schemes	4. Understand the features of defined contribution pension schemes		2 hours
4	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 8 – Occupational defined benefit pension schemes	5. Understand the features of defined benefit pension schemes		2.5 hours
4	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 9 – Legal issues	3. Understand the legal framework for pensions		2 hours
5	Reading notes, viewing audio visual presentation and taking the end of chapter assessment	Chapter 10 – Pension transfers	6. Understand the choices faced by early leavers and the use of transfer value analysis		2.5 hours

<b>Week Number</b>	<b>Method</b>	<b>Subject</b>	<b>Syllabus learning outcome</b>	<b>Test score</b>	<b>Study hours</b>
5	100 question final revision assessment	All chapters	1 – 7		2 hours
6	Case study incorporating 20 multiple choice questions	All chapters	1 – 7		1 hour
6	Final assessment 1	All chapters	1 – 7		0.5 hours
6	Final assessment 2	All chapters	1 – 7		0.5 hours
6	Revision reading focusing on weaknesses identified in assessments and case study	All chapters	1 - 7		3 hours
<b>Sub total for part 1: 27 hours</b>					

## PART 2 Focusing on Wizard Learning's J04 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 - 7		1 hour
7	50 question assessment 2	All chapters	1 - 7		1 hour
7	Revision reading	Chapters 2, 3 and 4 of online course plus weaknesses identified in assessments 1 & 2	1		4 hours
8	50 question assessment 3	All chapters	1 - 7		1 hour
8	50 question assessment 4	All chapters	1 - 7		1 hour
8	Revision reading	Chapters 5 & 6 of online course plus weaknesses identified in assessments 3 & 4	2 & 4		3 hours
9	50 question assessment 5	All chapters	1 - 7		1 hour
9	50 question assessment 6	All chapters	1 - 7		1 hour
9	Revision reading	Chapters 7 & 8 of online course plus weaknesses identified in assessments 5 & 6	4 - 5		3 hours
9	Random short assessments	All chapters	1- 7		3 hours
10	Revision reading	Chapters 1 & 9 of online course plus weaknesses identified in the random assessments	7 & 3		2 hours
10	Random short assessments	All chapters	1- 7		3 hours
10	Revision reading	Sections in the online course where weaknesses identified	1- 7		4 hours
<b>Sub total for part 2: 28 hours</b>					

## PART 3 Focusing on Wizard Learning's J04 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 – 7		2 hours
11	Case study 1	Chapters 2, 3 and 9	1, 3 & 4		2 hours
11	Assessor marked practice exam	All chapters	1 – 7		2 hours
11	Revision reading	Sections in the online course where weaknesses identified	1- 7		4 hours
12	Case study 2	Chapters 6 and 8	4 & 5		2 hours
12	Case study 3	Chapter 10	6		2 hours
12	Final revision reading	All chapters with a focus on the sections in the online course where weaknesses identified	1- 7		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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