

Summary of the contents of the AF1 Personal tax and trust planning: study package

Contents

Case study 1

Deals with various different trust aspects including selecting the most appropriate trust, tax, legal considerations and operation of the trust.

AF3 case study 1 - Case study with 20 related multiple-choice questions including explanations of answers. Deals with various capped drawdown aspects including income levels, planning, critical yield and death benefits.

Case study 2

Deals with various aspects of different trust types.

Case study 3

Deals with charitable trusts, charitable giving and trustees duties.

R03 Personal taxation: Online Course

J02 Trusts: Online course

R03 Personal taxation: Gap Analysis & Assessment Tool consisting of 300 multiple choice questions

J02 Trusts - 300 multiple choice questions consisting of 6 assessments of 50 questions

Learning to Learn - 5 online learning skills courses

Online Courses

J02 Trusts: Online course

This course provides: 9 chapters of study notes, revision assessments for each chapter, a case study incorporating 20 multiple-choice questions, 2 final 20 question assessments based on the study material.

Chapter 1 Introduction to trusts

Chapter 2 Trust creation, rules and uses

Chapter 3 Investment and administration of trusts

Chapter 4 Powers of attorney

Chapter 5 Wills and intestacy

Chapter 6 Bankruptcy

Chapter 7 Taxation of trusts

Chapter 8 Life assurance and pensions in trusts

Chapter 9 Reviewing trusts

R03 Personal taxation: Online course

This online course provides: 12 chapters of online study notes; interactive knowledge tests; revision assessments for each chapter; tax calculation workbook (PDF); audio (download to MP3 player or listen online) for the first 3 chapters; audiovisual presentations for the first 3 chapters

Chapter 1 UK tax compliance and self-assessment

Chapter 2 Income Tax

Chapter 3 National Insurance Contributions

Chapter 4 Capital Gains Tax

Chapter 5 Inheritance Tax

Chapter 6 Residence and domicile

Chapter 7 Stamp duties

Chapter 8 Value Added Tax (VAT) and Corporation Tax

Chapter 9 Direct investments

Chapter 10 Indirect Investments

Chapter 11 Tax in the financial affairs of individuals and trusts

Chapter 12 Personal tax and investment advice

R05 Financial protection: Online course

This online course provides: 11 chapters of online study notes; interactive knowledge tests; revision assessments for each chapter; audio (download to MP3 player or listen online) together with audiovisual presentations for chapters 1, 2 & 4; detailed statistics on your study time together with assessment results

Chapter 1 Consumer and market factors and trends relevant to financial protection

Chapter 2 The need for protection and the main sources of financial protection

Chapter 3 State Benefits

Chapter 4 Life Assurance

Chapter 5 The taxation of financial protection products

Chapter 6 Income Protection Insurance

Chapter 7 Critical Illness

Chapter 8 Long Term Care

Chapter 9 Other Insurances

Chapter 10 Needs and priorities for personal protection

Chapter 11 Business Protection

Assessments

R03 Personal taxation: Gap Analysis & Assessment Tool

Create 25 or 50 question assessments and select the delivery style. Revision style where the answers are shown after each question or exam style where a detailed report is provided at the end of the assessment. Incorporates standard questions and multiple response questions.

R05 Financial protection: Gap Analysis & Assessment Tool

Create 25 or 50 question assessments and select the delivery style. Revision style where the answers are shown after each question or exam style where a detailed report is provided at the end of the assessment. Incorporates standard questions and multiple response questions.

J02 Trusts - subject knowledge questions

Assessment package containing 6 assessments of 50 questions

Learning to Learn - 5 online learning skills courses

Learning to Learn includes these 5 learning skills courses: How to Improve Your Study Skills, How to Improve Your Exam Skills, How to Improve Your Memory and Mental Agility Skills, How to Improve Your Reading Skills, How to Improve Your Time Management for Learning Skills

How to Improve Your Time Management for Learning Skills online course

Online training course that will teach you how to improve your time management for learning skills.

Chapter 1 Introduction and Overview

Chapter 2 Learner Competencies

Chapter 3 Planning Part 1 - Principles

Chapter 4 Planning Part 2 - Scheduling

Chapter 5 Goal Setting for Learning

Chapter 6 Action Planning and "TO DO" Lists

Chapter 7 Prioritisation

Chapter 8 Obstacles to Achievement

Chapter 9 PDPs and CPD

Chapter 10 Summary

Chapter 11 End of course assessments

How to Improve Your Exam Skills online course

Online training course that will teach you how to improve your exam skills. Also includes audio and an audiovisual presentation of the full course.

- Chapter 1 Introduction and Overview
- Chapter 2 Knowing About the Exam
- Chapter 3 Exam Preparation – the Practicalities
- Chapter 4 Revision – A Timetable
- Chapter 5 Revision Techniques
- Chapter 6 Exam Papers
- Chapter 7 Before the Exam: Dealing with Nerves
- Chapter 8 Problems with Exams – and Some Solutions
- Chapter 9 Maximising Exam Performance
- Chapter 10 Summary
- Chapter 11 End of Course Assessments

How to Improve Your Reading Skills online course

Online training course that will teach you how to improve your reading skills.

- Chapter 1 Introduction and overview.
- Chapter 2 What is reading?
- Chapter 3 Types of Reading – Part 1
- Chapter 4 Types of Reading – Part 2
- Chapter 5 Speed Reading – Part 1
- Chapter 6 Speed Reading – Part 2
- Chapter 7 Managing Your Environment
- Chapter 8 SQ3R
- Chapter 9 Reading Electronic Materials
- Chapter 10 Summary
- Chapter 11 End of Course Assessments

How To Improve Your Memory and Mental Agility Skills online course

Online training course that will teach you how to improve your memory and mental agility skills.

- Chapter 1 Introduction and Overview
- Chapter 2 The Relevance of Memory to Learning and Work
- Chapter 3 Memory in a Nutshell
- Chapter 4 Knowing Your Mind
- Chapter 5 The Seven Habits of Highly Effective People
- Chapter 6 Recitation
- Chapter 7 Mind maps and Mnemonics
- Chapter 8 Practical Tips for Improvement
- Chapter 9 Forgetting
- Chapter 10 Summary
- Chapter 11 End of course assessments

How to Improve Your Study Skills online course

Online training course that will teach you how to improve your study skills.

- Chapter 1 Introduction and overview
- Chapter 2 Preparation
- Chapter 3 Learning styles
- Chapter 4 Principles of planning for study
- Chapter 5 A study plan
- Chapter 6 A model for study

Chapter 7 Resources and information sources
Chapter 8 Concentrating on your study
Chapter 9 Motivation
Chapter 10 Summary
Chapter 11 End of course assessments