

CHALLENGE ACCEPTED WEBINAR SERIES

LEARNING OBJECTIVES

APPROVED FOR ADVISER USE | SEPTEMBER 2020



Annual allowance

The second of our six webinars designed specifically for trainee planners and administrators and to introduce key areas of pension knowledge looks at the annual allowance covering the following learning objectives:

- To understand the difference between how much you can contribute, how much tax relief you can claim, and how much tax relief you can keep
- To be able to explain what contributions are and how they work
- To understand what happens when someone exceeds the annual allowance
- To understand the basic rules of the tapered annual allowance, MPAA, and carry forward

CPD On Demand hub

Keep up to date with our latest CPD content by visiting our [CPD On Demand hub](https://www.curtisbanks.co.uk/cpd) on our website www.curtisbanks.co.uk

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