

July 2024

R04: *Pensions and retirement planning* study text, 2024–25 edition

This edition of the study text is based on the 2024–25 examination syllabus and forms the study material for exams to be sat from 1 September 2024 until 31 August 2025.

Updates and amendments have been made throughout the text; where relevant, web updates issued for the 2023–24 edition have been included.

A summary of where the principal changes have been made is given below:

Chapter 1: sections A1 and A2.

Chapter 2: updated and restructured throughout.

Chapter 3: updated and restructured throughout.

Chapter 4: sections A2, C1 and D2; section D3C removed.

Chapter 5: sections C1B and C3; section D updated and restructured throughout.

Chapter 6: sections A4 and E1.

Chapter 7: sections A, B1, C1E and C2I.

Chapter 8: sections A1, A2, B4A, B7, D and D4; new section C7 added.

Chapter 9: sections A2A, B1 and B1A.

Chapter 10: sections B2 and F1.

Questions/answers, websites, key terms/points, cases, legislation and index: amended where relevant.

We hope this information is helpful to you.

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