

R04: *Pensions and retirement planning* study text, 2018–19 edition

This edition of the study text is based on the 2018–19 examination syllabus and forms the study material for exams to be sat from 1 September 2018 until 31 August 2019.

This new edition reflects the 2018/19 tax year. Updates and amendments have been made throughout the text; where relevant, web updates issued for the 2017–18 edition have been included.

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

Chapter 1: sections A2, B and D.

Chapter 2.1: sections A1, B, B3A, B4, B5, B5B, B5D and C2.

Chapter 2.2: sections F1, F3B, F3C, H and I2.

Chapter 3: sections A1, A2, A5, B1, B1B, B2, B3, C2A, C4B, C8, C8A, E3A and F.

Chapter 4: sections D4 and F4, new section G .

Chapter 5: section A1E, new section B1B, sections B2A, B3A, B4 and D1A, section E2 deleted.

Chapter 6.1: section C2A.

Chapter 6.2: sections E1A, E1B, E1C, F, F1A and F2.

Chapter 7: section A2A, subsequent sections re-organised, sections B1A, B2, B3 and B6.

Chapter 8: sections A1, A2, A2A, A3, B3A, B5A, B5B, B6A, C2, C3, C4A, C4B, C4C, C5, D1C, D2, E3A and F1.

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

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