

Personal Finance Society Yorkshire Region AF1 (Taxation and Trusts) Revision support

The Personal Finance Society (Yorkshire region) has organised training support via four half-day Zoom sessions between 6th – 9th September 2021 (9.30am – 1.00pm) ahead of the AF1 (Taxation & Trusts) exam sitting on 29th September 2021. The Trainer will be Steve Davis of the Financial Adviser Academy (www.financialadviseracademy.org).

In Steve's extensive experience, passing AF1 requires three essential ingredients:

1. Good exam technique – not missing out on marks you be should getting.
2. Knowledge relevant to the case study at hand – at the right depth for a Level 6 exam.
3. The ability to put the first two together on exam day - for three hours, on every question!

The four half-day sessions are designed to ensure you have all three ingredients and are therefore fully prepared on the day of the exam. The gaps between sessions allow for consolidation of learning ahead of the next session, a rest, plus you may have a business to run, or other meetings.

Pre-course	Read the Examiner Report for previous AF1 exam and read through pre-course handouts (x 3)	
Session 1 Monday 6 th September	09:30 to 12:30	<ul style="list-style-type: none"> • IHT • Wills and intestacy
Session 2 Tuesday 7 th September	09:30 to 12:30	<ul style="list-style-type: none"> • Review session 1 • Taxation of trusts • Bankruptcy • Investments – property
Session 3 Wednesday 8 th September	09:30 to 12:30	<ul style="list-style-type: none"> • Review of session 2 • Residence & Domicile • Income tax
Session 4 Thursday 9 th September	09:30 to 12:30	<ul style="list-style-type: none"> • Review of session 3 • Tax reducers • CGT • LPOAs • Next step: plans to pass AF12

Cost of attendance £270 (PFS/CII Members) or £285 for non PFS/CII Members.

Register to attend here:

<https://www.localinstitutes.cii.co.uk/sheffield/home/events/2021/af1-personal-tax-trust-planning-online-training-course/>