**Assess Your Learning**

**Topic 7: Fund Management & Retirement Planning**

**Tick the level of your understanding for each of the areas covered:**

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| **Define FUND MANAGEMENT** | 🞎 Yes, I am able to do this fully.  🞎 I am able to do this to an extent.  🞎 No, I need help with understanding this. |
| **Define RETIREMENT PLANNING** | 🞎 Yes, I am able to do this fully.  🞎 I am able to do this to an extent.  🞎 No, I need help with understanding this. |
| **Explain how COLLECTIVE INVESTMENT works including comparison with direct investment, pooling, diversification and expertise.** | 🞎 Yes, I am able to do this fully.  🞎 I am able to do this to an extent.  🞎 No, I need help with understanding this.  . |
| **Explain the three different types of pension plans.** | 🞎 Yes, I am able to do this fully.  🞎 I am able to do this to an extent.  🞎 No, I need help with understanding this. |
| **Stretch & Challenge:**  ***“Winners and Losers under the New State Pension Scheme”***  **Using this article as a basis, and conducting some of your own research draw up a case for and against the new state pension scheme introduced by George Osbourne in March 2016.** | 🞎 Yes, I am able to do this fully.  🞎 I am able to do this to an extent.  🞎 No, I need help with understanding this. |

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| **State below anything you need further help with:** |

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| **Student Name/Signature: Date** |

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| **Tutor Name/Signature Date** |