



USEFUL
resources

BASICS

Bank of England

bankofengland.co.uk

Money & Pensions Service

moneyandpensionservice.org.uk/

Pension Wise

moneyhelper.org.uk/en/pensions-and-retirement/pension-wise

Gov.uk

gov.uk

Which

which.co.uk/money

Royal London

- PENSIONS
- PROTECTION
- TRUSTS

adviser.royallondon.com/technical-central

Pru

- KNOWLEDGE LIBRARY
- KNOWLEDGE TV AND VIDEOS
- ORACLE LIVE WEBINARS
- SEMINARS

pruadviser.co.uk/knowledge-literature/knowledge-library

TECHNICAL

Abrdn (formerly Standard Life)

- PENSIONS
- INVESTMENTS
- PERSONAL TAXATION
- IHT AND ESTATE PLANNING

techzone.abrdn.com/anon/public

Pru

- LIFETIME ALLOWANCE
- TAPERED ANNUAL ALLOWANCE
- TOP SLICING RELIEF
- TAXATION UK INVESTMENT BONDS
- ANNUAL ALLOWANCE

pruadviser.co.uk/knowledge-literature/technical

Scottish Widows

- PENSIONS
- ANNUITIES
- PROTECTION
- TAXATION

adviser.scottishwidows.co.uk/assets/literature/docs/FP0418.pdf

Aviva

- PENSIONS
- TAXATION
- TRUSTS AND IHT
- PROTECTION

connect.avivab2b.co.uk/adviser/resources/product-support/tech-centre/

TECHNICAL

Fidelity

adviserservices.fidelity.co.uk/technical-resources/paraplanner-retirement-planning-and-pension-toolkit

MorningStar

morningstar.co.uk/uk/author/2610/holly-black.aspx

Professional Paraplanner

professionalparaplanner.co.uk/development

Canada Life

- IHT
- TRUSTS

canadalife.co.uk/estate-planning