

AF1 Study Checklist

One of the difficulties when studying, can be following and sticking to a Study plan. To help you stay on track, we have designed this free study plan checklist.



You don't have to follow this to the letter, but it will give you a suggested track to run along up to your exam sitting. As each week goes by, aim to tick off the subjects you have covered. If you fall behind, you will be able to easily see what you need to do to get back on track. The CII recommend 150 hours of study for AF1.



This Study plan follows the format of our [AF1 Study Guide](#), and our [AF1 Coaching Support Package*](#). If you haven't yet ordered your guide or booked your space on our coaching programme, you can do this by scanning the QR code or heading to: <https://www.bespoketrainingsolutions.com/shop/>

Dates	Topic	Recommended Study Hours	Achieved?
Income Tax: Part 1 26 th June – 03 rd July	Types of Income	16	
	Order of Income		
	Reliefs overview		
	Personal allowance		
	Band Extenders		
	Review of stages so far		
	Tax Calculation		
	Consolidation Exercise		

Dates	Topic	Recommended Study Hours	Achieved?
Income Tax: Part 2 04 th July – 12 th July	Employee Benefits in kind	16	
	Company Cars		
	Beneficial loans		
	Living accommodation		
	Self-employed income taxation		
	Rental profits		
	Tax reducers		
	Tax charges		
	Income tax planning		
	Consolidation Exercise		
	Watch Video 1 – Release Date 5th July*		
	Attend Live Webinar – 12th July*		



Dates	Topic	Recommended Study Hours	Achieved?
Capital Gains Tax & National Insurance Contributions 15th July – 26th July	CGT Disposals	11	
	Assets		
	Exempt assets		
	Chattels		
	Principle private residences		
	Part disposals		
	Share Identification rules		
	Allowable costs for CGT		
	Losses		
	Capital Gains Tax Calculation		
	CGT Reliefs		
	Paying CGT		
	Tax planning opportunities for CGT		
	Consolidation Exercise		
	NI Overview		
	Class 1 – employees, directors and employers		
	Special categories		
	NIC Credits		
	Classes 2 and 4 – Self-employed		
	NICs and residency		
	Maximum contributions		
	Class 3 – Voluntary contributions		
	National Insurance Planning		
	National Insurance – Case Study Style Questions		
	Watch Video 2 – Release Date 17th July*		
	Attend Live Webinar – 26th July*		



Dates	Topic	Recommended Study Hours	Achieved?
Inheritance Tax – Part 1 29 th July – 03 rd August	Different types of transfers	16	
	Lifetime transfers		
	Transfers on death		
	The Nil Rate Bands		
	Reliefs		
	Inheritance Tax Case Study Style Questions		
	Watch Video 3 – Release Date 2nd August*		

Dates	Topic	Recommended Study Hours	Achieved?
Inheritance Tax – Part 2 03 rd August – 09 th August	Lifetime transfers	16	
	Impact of death on lifetime transfers		
	Estate taxation		
	Payment of the tax		
	IHT planning opportunities		
	Inheritance Tax Case Study Style Questions		
	Attend Live Webinar – 9th August*		

Dates	Topic	Recommended Study Hours	Achieved?
Taxation of Trusts & Residence and Domicile 13 th – 21 st August	Trust basics	16	
	Types of trust		
	Insuring the IHT liability		
	Use of Investment Bonds and trust taxation		
	Periodic and exit charges		
	Use of trusts in personal tax planning		
	Inheritance Tax and trusts summary		
	Trust taxation summary		
	Taxation of Trusts Case Study Style Questions		



Dates	Topic	Recommended Study Hours	Achieved?
Taxation of Trusts & Residence and Domicile - Continued	Residence & Domicile – an overview	16	
	Domicile		
	Excluded Property Trust		
	Tax liabilities		
	Residence and Domicile Case Study Style Questions		
	Watch Video 4 – Release Date 13th August*		
	Attend Live Webinar – 21st August*		

Dates	Topic	Recommended Study Hours	Achieved?
Bankruptcy and Decision making & Other Taxes 21st August – 25th August	Bankruptcy	11	
	IVAs		
	Other options		
	Powers of Attorney		
	Delegated Decision-making in financial planning		
	Chapter Summary		
	Bankruptcy and Delegated Decision-making Case Study Style Questions		
	Stamp duties – an overview		
	Value Added Tax – an overview		
	Corporation Tax		
	Business Tax planning opportunities		
	Other taxes Case Study Style Questions		



Dates	Topic	Recommended Study Hours	Achieved?
Investment Taxation 26 th – 30 th August	Direct investments – an overview	11	
	Cash & fixed-interest		
	Dividend income		
	Property income		
	Indirect investments		
	Private Equity		
	Life Assurance Products		
	Indirect investments in property		
	Key indirect investment taxation		
	Investment taxation planning opportunities		
	Investment Taxation Case Study Style Questions		

Dates	Topic	Recommended Study Hours	Achieved?
Past Papers 30 th August – 09 th September	Sit Past Paper 1 – Timed Conditions	22	
	Mark Past Paper 1		
	Reflect on Performance in Past Paper 1		
	Sit Past Paper 2 – Timed Conditions		
	Mark Past Paper 2		
	Reflect on Performance in Past Paper 2		
	Sit Past Paper 3 – Timed Conditions		
	Mark Past Paper 3		
	Reflect on Performance in Past Paper 3		
	Sit Past Paper 4 – Timed Conditions		
	Mark Past Paper 4		
	Reflect on Performance in Past Paper 4		

Dates	Topic	Recommended Study Hours	Achieved?
Workshop Day 1: 28 th August	Attend Workshop Day 1: Income Tax, CGT & NICs*	7	
Workshop Day 2: 2 nd September	Attend Workshop Day 2: IHT, Trusts & Investments*	7	



*What's included in the AF1 Coaching Support Package?



Are you planning to take the AF1 exam in September but feeling unsure about where to begin? Our comprehensive course is designed to cater to all learning styles and follows the BTS' **Read Watch Practice** approach. This structured course aims to give you the best chance of achieving success in this challenging unit.

Whilst you read through the BTS Study Guide chapters, we will provide you with **four recorded webinars** to further enhance your understanding.

Additionally, we understand the importance of putting your knowledge into practice. Therefore, **a week after each recording, we will host a live webinar** where you can practice answering different types of questions that may appear in the AF1 exam.

To consolidate your learning, we have included **two workshop days** at the end of the course. Furthermore, you will have access to trainer support through the BTS forums, and all recordings will be available to you until your exam date. We believe that those who prefer a more hands-on approach will greatly benefit from and even enjoy our AF1 Coaching Support package.

You will be amazed at what you learn by being part of this cohort and 'having a go' at the questions. Technical areas that may come up will be covered and revised, and group discussions around possible questions and answers will help a lot.

AF1 coaching support sessions are available for each sitting of the exam. If you can't see a date that works for you, get in touch to ask about more options.

To book your space, go to: <https://www.bespoketrainingsolutions.com/product-category/event-ticket/> or scan the QR Code.

