

## AF4 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 AF4.



This Study plan follows the format of our [AF4 Study Guide](#), and our [AF4 Coaching Support Programme\\*](#). 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?
Economic Environment  25 <sup>th</sup> June – 16 <sup>th</sup> July	Introduction to the Economic Environment	10	
	International markets		
	Economic and financial cycles		
	Fiscal and monetary policy		
	Money supply		
	Systematic and non-systematic risk		
	Inflation, deflation and disinflation		
	Interest rates		
	Credit risks		
	Currencies and exchange rates		
	Balance of payments		
	Role of financial investment in the economy		
	Diversification		
	<b>Watch Video 1 – Release Date 9<sup>th</sup> July*</b>		
	<b>Attend Live Webinar – 16<sup>th</sup> July*</b>		



Dates	Topic	Recommended Study Hours	Achieved?
Direct Investments  17 <sup>th</sup> – 30 <sup>th</sup> July	Cash Investments	10	
	AF4 Calculations		
	Fixed-interest securities		
	Equities		
	Property		
	Alternative investments		
	<b>Watch Video 2 – Release Date 23<sup>rd</sup> July*</b>		
	<b>Attend Live Webinar – 30<sup>th</sup> July*</b>		

Dates	Topic	Recommended Study Hours	Achieved?
Collective Investments  31 <sup>st</sup> July – 13 <sup>th</sup> August	Indirect investment products	30	
	Unit trusts and OEICs: general characteristics		
	Unit trusts		
	Open-ended investment companies		
	Unit trust and OEIC management services		
	Offshore funds		
	Closed-ended funds; investment trust companies		
	Life assurance-based investments		
	Exchange traded products		
	Property based investments		
	Private Equity		
	Annuities		
	Derivatives		
	Hedge fund and funds of hedge funds		
	Absolute return funds		
	Structured products		
	Sharia-compliant investments		
	Tax efficient wrappers		
	<b>Watch Video 3 – Release Date 7<sup>th</sup> August*</b>		
<b>Attend Live Webinar – 13<sup>th</sup> August*</b>			



Dates	Topic	Recommended Study Hours	Achieved?
Individual Company Performance and Company accounts  14 <sup>th</sup> – 27 <sup>th</sup> August	Company accounts	15	
	Financial Statements		
	Analysing companies		
	<b>Watch Video 4 – Release Date 20<sup>th</sup> August*</b>		
	<b>Attend Live Webinar – 27<sup>th</sup> August*</b>		

Dates	Topic	Recommended Study Hours	Achieved?
Risk and returns, investment portfolio management and the advice process  28 <sup>th</sup> August - 10 <sup>th</sup> September	Return calculations	37	
	Risk management		
	Investment theories		
	Measurement of returns		
	Portfolio construction		
	Portfolio optimisation		
	Portfolio creation considerations		
	Management styles		
	Monitoring performance		
	Providing investment advice		
	Risk profiling		
	Defining objectives		
	Asset allocation		
	Fund selection		
	Wrapper selection		
	Platform selection		
	Investment policy statement		
	Investment reviews		
	Investment management services		
	Drawing income from a portfolio		
<b>Watch Video 5 – Release Date 03<sup>rd</sup> September*</b>			
<b>Attend Live Webinar – 10<sup>th</sup> September*</b>			



Dates	Topic	Recommended Study Hours	Achieved?
Workshop Day 1: 12 <sup>th</sup> September	Attend Workshop Day 1*	7	
Workshop Day 2: 19 <sup>th</sup> September	Attend Workshop Day 2*	7	

Dates	Topic	Recommended Study Hours	Achieved?
Past Papers  12 <sup>th</sup> September – 30 <sup>th</sup> September	Sit Past Paper 1 – Timed Conditions	33	
	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		
	Mark Past Paper 4		



## \*What's included in our AF4 Coaching Support Programme?



Are you planning to take the AF4 exam in October but feeling unsure about where to begin? Our comprehensive course is designed to cater to all learning styles and follows the BTS' **Read Watch Practise** 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 **five 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 AF4 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 AF4 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.

AF4 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.

