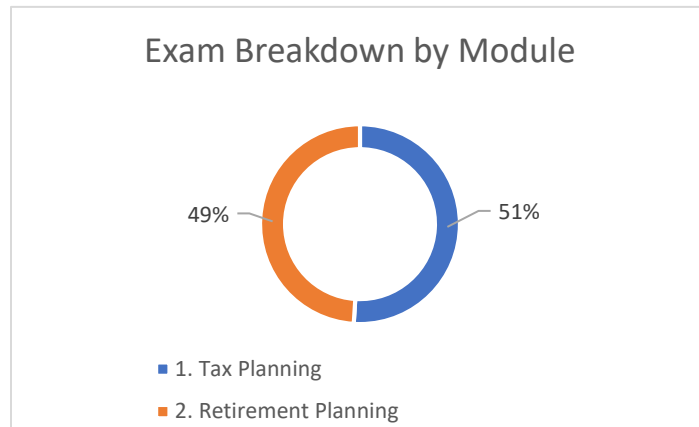


## Introduction

The FPSB® Retirement and Tax Planning Exam Blueprint communicates the guidelines on the content areas, difficulty levels, and percentage value assigned to competencies as defined within the FPSB® Retirement and Tax Planning Competency Profile. This blueprint guides exam developers and the FPSB Ltd. Exam Panel in the development of the examination and assists exam-takers in understanding what will be tested on the examination. Every question on the examination focuses on a specific learning objective or knowledge item from the Competency Profile and may also require integration across several competencies. Exam candidates should use this blueprint combined with the competency profile to help prepare for the exam.

## Exam Overview

- 75 multiple-choice questions (4 possible answer choices)
- Computer-based testing format
- Duration - two hours will be allotted
- Financial calculators are allowed (once data is erased)
- Multiple choice format - each question has four possible answer choices, one of which is clearly the best choice.



## Areas of Practice

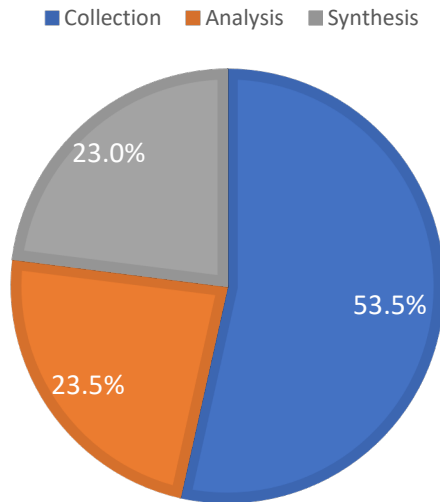
The FPSB® Retirement and Tax Planning exam will test the knowledge, skills and abilities pertaining to the three modules based on the approximate specifications shown in the pie chart below.

The exam will test the following areas of practice. Refer to the FPSB® Retirement and Tax Planning Competency Profile for more detailed descriptions.

FPSB® Retirement and Tax Planning Areas of Practice	
<b>Retirement Planning</b> <ul style="list-style-type: none"> <li>• Retirement Principles</li> <li>• Retirement Objectives</li> <li>• Retirement Needs Analysis and Projections</li> <li>• Potential Sources of Retirement Cash Flow</li> <li>• Retirement Cash Flow, Withdrawal Projections and Strategies</li> </ul>	<b>Tax Planning</b> <ul style="list-style-type: none"> <li>• Taxes Payable by an Individual</li> <li>• Effect of Selling Property</li> <li>• Record-Keeping</li> <li>• Tax Planning Strategies</li> <li>• Cross-Border Taxation</li> </ul>

### Difficulty Levels

The FPSB® Retirement and Tax Planning exam defines the knowledge, skills and abilities to be evaluated. This includes three difficulty levels: collection, analysis and synthesis.



**Collection:** gathering information and identifying related facts by making required calculations and arranging client information for analysis. During the collection function, the core competency is to collect the quantitative information and qualitative information required to provide advice.

**Analysis:** considers issues, performs financial analysis and assesses the resulting information to be able to develop strategies for the client. This includes: (1) to consider potential opportunities and constraints in developing strategies, and (2) to assess information to develop strategies.

**Synthesis:** integrates the information needed to develop and evaluate strategies to create a retirement and tax optimization plan.

The FPSB® Retirement and Tax Planning exam will not have specific sections allocated to the modules; test-takers will see questions pertaining to each module in no specific order throughout the exam. Likewise, although the textbooks draw a distinction between “global” and “India-specific” sections, questions on each section will be interspersed in no specific order throughout the exam.

