Pension and fiduciary service

PMC VSR Basic Core Course

Phase 4: Foundational Enrichment

Types of Pension Claim and Claims Recognition

NOTES PAGE

January 2025

Types of Pension Claims and Claims Recognition

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| Presenter: |  |
| Topic: | Types of Pension Claims and Claims Recognition |
| Key Message:(summarize the key message or theme of the presentation) | This lesson is part of the entry-level curriculum, Core Pension Training curriculum for PMC VSRs. The purpose of this lesson is to introduce you to the variety of claim types you will encounter as a PMC VSR. **You are encouraged to use this document to take notes, and jot down any questions for clarification.** |
| 1st point:(summarize the 1st point) |  |
| 2nd point:(summarize the 2nd point) |  |
| 3rd point:(summarize the 3rd point) |  |
| Important vocabulary:(include list of key vocabulary referenced; if you do not know the term(s), look up and add a definition for the word(s)) |  |
| Questions(include any questions you have remaining after the presentation) |  |