



PRECEPTSGROUP  
INTERNATIONAL

启盛集团

# GROW YOUR LEGACY WITH US

· PERSONAL · PERCEPTIVE · PREPARED

## **We are PERSONAL.**

Every legacy is distinctive,  
every solution is unique.

## **We are PERCEPTIVE.**

Understanding your core goals  
and helping you to navigate the  
diverse aspects of your legacy.

## **We are PREPARED.**

Leveraging in technology for a  
seamless and effective experience.



## Who is PreceptsGroup International?

Following a management buy-out in September 2019, the PreceptsGroup is the new brand name of the Rockwills Singapore Group of Companies. Rockwills Singapore had its beginnings in 2008 and in its evolution, all existing Rockwills Singapore entities have been rebranded with the new name. Notwithstanding the brand change, the Estate Planning, Will Writing and Trust businesses continue strongly as usual, upon Precepts taking over the mantle from its former Rockwills heritage.

Today, PreceptsGroup continues its services to thousands of families in Singapore with their Estates and Trusts through Precepts Trustee Ltd, a licensed Trust Company regulated by the Monetary Authority of Singapore.

The acquisition will enable the new owners to carve a new path for the group of companies. The Precepts brand is adopted to be compatible with our core beliefs and it

reflects the company's ambitious plans in its future growth and direction. Some of the new initiatives will be to serve clientele in the Asia Pacific region where there is a growing demand for Estate Planning and Wealth Succession solutions.

There are strong signals that many mass affluent and wealthy families in the region would like a safe harbour jurisdiction like Singapore where they could manage their assets for wealth preservation, succession and protection. The aging population trend across the region leads to an ever-growing need for proper structures and plans so that hard earned accumulated funds are not squandered away, do not create family disputes and destroy lives.

The opportunities are abundant and the PreceptsGroup is well positioned to offer comprehensive services and solutions to clients and their family members for their legacy plans.





# What do We Do?



## Precepts Trustee Trust Services



SGD 2 billion  
Assets Under Trust



Set Up more than  
700 Living Trusts



Appointed Executor & Trustees  
for more than 6,000 individuals  
and families' estate and Trust



One-stop solution

Since 2008, Precepts Trustee Ltd. (previously known as Rockwills Trustee Ltd) is licensed by the Monetary Authority of Singapore (MAS), (Licence No. TC000040) to provide Trust services which comprises acting as trustee, providing trust administration services as well as the setting up of trusts.

Trust structuring is highly bespoke and can apply in many circumstances, from a simple declaration

of trust over an asset like company shares to complex structures involving trusteeship of highly valuable assets situated in several jurisdictions.

Many business owners and families count on us to ensure their legacy plans are being carried out accordingly. We are licensed to serve as a Professional Trustee to look after our clients' monies and ensure the assets are distributed to their chosen beneficiaries in a manner our clients have planned for.

### TRUST LICENCE AND REGULATED ACTIVITIES

Precepts Trustee is a Trust company (Licence No. TC000040) licensed by the Monetary Authority of Singapore (MAS). It is licensed to conduct the following regulated activities:

- Provide services with respect to the creation of an express Trust
- Acting as Trustee in relation to an express Trust
- Arranging for any person to act as Trustee in respect of an express Trust
- Provide Trust administration services in relation to an express Trust

### Estate and Trust Administration

Estate administration is a process in which the appointed Executor or Administrator administers the estate of a deceased person.

Typically, when one has passed away, his or her spouse or next-of-kin will apply to Court to deal with the deceased debts, liabilities, funeral and other expenses before distributing the balance of his/her monies and properties.

The administration proceedings can be lengthy and complex. It can be taxing on your loved ones. It could be costly if your Administrator/Executor lacks the knowledge in handling legal matter and issues.

With Precepts Trustee, we have a team of legal counsels with such expertise, experience and impartiality to ensure that the estate distribution process is smooth and stress-free for the beneficiaries.





# Precepts Legacy

## Will-Writing & Custody Services

A Will is one of the foundational instruments in a Legacy Plan. Honed with the experience of writing more than 12,000 Wills, as well as handling complex Estate Administration cases, we combine both legal knowledge and practicalities into our service offerings.

Our team of Estate and Succession Practitioners (ESPs) listen and take heed of the needs of every client. They would then assist to design and structure the distribution plans.

We have a proprietary software to ensure that our ESPs provide comprehensive guidance to clients in planning for the distribution of their assets. Each Will is then crafted specially to their needs by a team of qualified and experienced in-house legal counsels.

Upon finalising the Will, Precepts provides clients a safekeeping service for their Will. Our Will Custody service ensures that at the point when the Will is needed, it could be retrieved efficiently with no compromise on the client's original intentions.

The Custody service is based on a coded document security system, which ensures that each Will is uniquely identified and tracked for efficient retrieval.

Clients may choose to appoint Precepts Trustee as the Estate's Executor and Trustee to have the peace of mind that their intentions will be executed purposely, fairly, and competently.

## Precepts Corporate Services

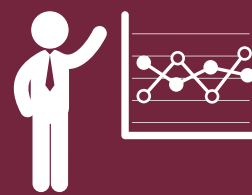
The nature of today's fast pace business environments paves the way for new opportunities across the world. We at Precepts will guide you and your business to address the challenges and changes for businesses looking to expand their operations into unfamiliar territories.

We have a strong global network and a wealth of experience for us to provide tailored services for a wide variety of clients as they steer the ever-changing regulatory environments. Our service includes advising on the right type business structure in various jurisdictions, along with their obligations. We have administered structures in more than 25 jurisdictions and can provide hassle-free business registrations in territories including Singapore, Marshall Islands, Seychelles, BVI, Malaysia and Cayman Islands.

At Precepts, we take over the administrative burden of setting up a company, so you can focus on your priority of building the business.



Over **1,500**  
Satisfied Clients



More than **25**  
Years of  
Corporate Advisory

### OUR SERVICE OFFERINGS:

- Incorporations
- Global Offshore Incorporations
- Company Secretary
- Nominee Director/Shareholder
- HR & Payroll
- Immigration & Workpasses
- Escrow & Custodial Arrangement (with Precepts Trustee)



## Estate Planning Practitioners Limited (EPPL) Precepts Academy

### Estate Planning Certification Programmes & Training

#### International Certification and Training

Together with United Kingdom's esteemed Society of Will Writers, EPPL jointly awards the accreditation of Associate Estate Planning Practitioner (AEPP®) title. Across the region, there are more than 4,000 designees. EPPL promotes the growth of Estate Planning expertise across various countries by developing content and organising conferences as well as networking tours for designee holders and practitioners to learn about local regulations and practices.

More details can be found on [www.epplasia.com](http://www.epplasia.com).

#### Singapore Certification and Training

Precepts Academy conducts accreditation courses for professionals in the financial advisory, insurance and banking industries.

We hold the exclusive appointment to facilitate the STEP Certificate for Financial Services – Trusts and Planning, Singapore course. The course serves to enhance the breadth and depth of the participants' knowledge to enable them to integrate wealth management and estate planning service for their clients.

On successful completion of the STEP Certificate, the participants can work towards qualifying as a STEP Affiliate.

We are the course provider of the Associate Estate Planning Practitioner (AEPP®) Designation Certification Programme in Singapore, a practical and marketing-based course for all who have an interest in estate and succession planning, especially financial advisers. This programme enables them to offer estate planning advice to enhance their core services. For more specialised topics on Estate Planning, we have the AEPP® Advanced Modules.

In addition, we provides training courses and seminars in estate planning for Precepts' Estate and Succession Practitioners and for members of the public.

- STEP Certificate for Financial Services - Trusts and Estate Planning, Singapore
- Associate Estate Planning Practitioner (AEPP®)
- Associate Estate Planning Practitioner (AEPP®) Advanced Modules
- Estate Planning and Wealth Succession Asia Forum

## CAREER AS

### ESTATE AND SUCCESSION PRACTITIONER AND INTRODUCER FOR TRUST SERVICES

We offer an opportunity for dynamic business partners to come on board and provide Estate Planning services to your clients as our Estate and Succession Practitioners (ESPs). With the aging population, there is a strong increasing trend for estate planning services. With Singapore as a growing financial hub, the opportunity to grow your business and career in estate planning and wealth succession is tremendous.

We offer a unique business proposition where you as our business

partners can to help your clients and family members work out and manage their legacy plans through successive generations.

We are also very committed to grow the expertise of our ESPs through continuous training, horizontal and vertical exposure, and networking across our platform of service offerings. We welcome participants from various fields to join us to build this community of Legacy Planning specialists.







A 'Precept' refers to a rule, directive or principle, that guides one's actions. Precepts are the words to live by, to help guide you or your family members in making decisions, or a command to fulfil a request. Precepts are like guiding lamps, that can help families or even a group of persons to navigate through challenging times, to succeed with a common set of shared values.

In PreceptsGroup, we strive to help you to formulate a set of guiding principles and set up structures that will help you grow your legacy.

To do this, we have built a firm foundation of service offerings and specialised companies that will be able to support you, whether as an individual, family business owner, business partners or beyond.

"Precepts" represents our belief that regardless of your age and wealth, putting a plan in action is the best thing you can do for yourself, your loved ones and future descendants, to ensure that your desired legacy will be lasting and fulfilling.

This plan and structure will help to minimise entanglements and provide the right resources at the right time for your loved ones for generations to come.

**GROW YOUR LEGACY WITH US.**

### Contact us for more details:

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