ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®) CERTIFICATION PROGRAMME

AEPP® | The Society of Will Writers | EPPL Estate Planning Practitioners Limited

ABOUT THIS PROGRAMME

The Associate Estate Planning Practitioner (AEPP®) is a practical and marketing-based course for Professional Advisers wishing to use estate planning to enhance their core advisory services. This programme is specially designed to enhance your knowledge to address the growing needs of estate planning and wealth succession.

Our dynamic and experienced course facilitators have plenty of insights to share with you on how to use estate planning to energise and supercharge your advisory business.

Upon completing the two-day course, you will be able to include the AEPP® designation to your credentials.

The Associate Estate Planning Practitioner (AEPP®) designation is awarded by the Society of Will Writers (SWW) of the UK and the Estate Planning Practitioners Limited (EPPL).

This course will also award you a total of 12 Hours.

KEY LEARNING OUTCOMES

On completing the AEPP® certification programme, participants can look forward to:

- receiving high-value practical knowledge that can be applied to their current practice immediately and stay ahead of their competitors
- gaining access to the expertise of practitioners in estate planning and wealth succession who are able to relate real-life case studies and their applications
- having the ability to apply the practical concepts taught in this programme

COURSE STRUCTURE & ASSESSMENT

The AEPP® certification programme is delivered through a two-day workshop. To be accredited as an AEPP® designee, you will need to attend the workshop and pass the course assessment. For workshop dates, you may wish to visit https://preceptsgroup.com/aepp/

COURSE OUTLINE

DAY 1 *PRACTICAL ASPECTS OF ESTATE PLANNING*

- Introduction to Estate Planning
- Life Cycle of Wealth
- The tools of Estate Planning
- Estate planning creates opportunities for Sales
- Estate Planning with Fund Creation
- Business Succession Planning

DAY 2 *ESTATE PLANNING FOR THE MASS AFFLUENT AND FAMILY BUSINESSES*

- Case Studies and Worksheets
- Estate Planning Services
- Mass Affluent Estate Planning
- Estate Planning for the Elder Client
- Inheritance and Concepts involved in wealth perpetuation
- Family Business Succession with Private Trust Company (PTC)

YOUR PROGRAMME TRAINERS

MR. ALAN WONG

AFP®, AEPP®
W3 Consultancy Pte Ltd

Alan Wong is the Principal Consultant of W3 Consultancy Pte Ltd which provides training and consultancy services in the specialised field of Business Protection Planning. He has won awards for the Trust businesses he has completed.

He has trained numerous financial consultants from insurers as well as IFAs. A financial consultant himself with more than 15 years of experience, he focuses his practice on planning for Business Owners using estate planning. He is highly effective in penetrating this market and often able to win over clients from banks and other intermediaries who serve the Ultra HNW individuals and business owners.

MR.LEE CHIWI

Chief Executive Officer,
PreceptsGroup International Pte Ltd
Advocate & Solicitor, ChT, TEP

Lee Chiwi is the Chief Executive Officer of PreceptsGroup International Pte Ltd and Chairman of Estate Planning Practitioners Limited (EPPL). He was called to the Bar of & Wales as a Barrister-at-Law in 1986 and admitted as an Advocate & Solicitor of Singapore in 1988. He worked in various law firms in Singapore for some 16 years focused in the areas of corporate, funds and private client work. He was appointed Chief Executive of British and Malayan Trustees Limited, then a public listed trust company from 2006 to 2007. In 2008, he joined the Rockwills Group in Singapore as Chief Executive to spearhead Rockwills' business in Estate Planning, Wills, and Trusts. In 2019, in a management buy- out of Rockwills Singapore, he became its substantial owner and the group was renamed as the PreceptsGroup.

He is a TEP member of the Society of Trust and Estate Practitioners and was Chairman of the Singapore STEP Branch (2014/15). He was also designated ChT (Chartered Trustee) by the Singapore Trustees Association in 2015, a title borne only by senior trust practitioners in Singapore. Chiwi is the author of various books including "PreceptsGroup Succession and Trusts in Wealth Management", 4th Edition, 2021; and "Drafting of Trusts and Will Trusts", with James Kessler Q.C., 2nd edition, 2015. He has been invited to speak at many forums, including organizers such as STEP, FPAS, CFA Society Singapore, the IBF and given training on trust structures to tax officers at the Inland Revenue. He has also been adjunct faculty with the Singapore Management University, lecturing in the MSc Program in Wealth Management, (Estate Planning and Tax).

YOUR PROGRAMME TRAINERS

MR LIM BOON YAM

Boon Yam joined the wealth management industry in 2000 after working for several years as a regional manager in an MNC. Boon Yam specialises in advising business families and high net worth individuals on comprehensive wealth management and succession planning. His work involves the facilitation of the setup of family wealth structures and family governance to ensure peace and harmony within the family.

Boon Yam is an active volunteer in public education on estate & financial planning for various government and private agencies. These include speaking engagements on public forum for CPF members. His views have been aired on radio shows, and he has been featured on TV channels like Channel U & Channel 8, and major Chinese newspapers like Lianhe Zaobao, Shin Min Daily News and Lianhe Wanbao.

PROGRAMME PARTNERS

ABOUT ESTATE PLANNING PRACTITIONERS LIMITED (EPPL)

The Estate Planning Practitioners Limited is the body which promotes estate planning as a professional practice throughout Asia via training, seminars, conferences and exchange of ideas.

The EPPL will also be responsible for working with various country representatives to promote the current professional designation – the Associate Estate Planning Practitioner (AEPP®) and International Corporate Services Practitioner (ICSP) designations – and other future designations related to the practice of estate planning. It will also work with various country representatives to create and promote awareness of the importance of estate planning professional communities – a critical component of wealth distribution (in the context of complete wealth planning).

ABOUT THE SOCIETY OF WILL WRITERS (SWW)

The Society of Will Writers is a well–respected non-profit self-regulatory organisation which seeks to protect the public and serve the interests of active professionals in the field of will-writing and estate planning practice in the United Kingdom.

Today, the Society has the largest database of highly-qualified and indemnified will writers &estate planning practitioners (including Independent Financial Advisors).

COST AND HOW TO APPLY

Course Fee	Designation Fee
$1,200 Includes course manual and assessment fee	$300 $250 (early bird rate if payment is made before class commences)

^ *For AEPP® course, we have the following fundings available: You can only claim from* **ONE** *of the TWO available.*

Institute of Banking & Finance Funding	Skills Future
Pre-requisites •Singaporean/Singapore PR •Working in a Financial Institution **Enhanced Support** •90% Funding	Up to the credits in your SkillsFuture

IBF Funding			Skills Future
Course Fee		**$1,200**	SkillsFuture credit claimable through SkillsFuture portal.
Enhanced Funding by IBF	90% of Course Fee	-$1,080	
Nett Fee	**10%**	**$120**	
7% GST of Course Fee	7% of Course Fee	$84	
Designation Fee	**Incl 7% GST**	**$267.50**	
Total Outlay		**$471.50**	

IBF Programme Code: P200409IOY

Terms & Conditions

1. IBF Enhanced Funding Support of 90% is only for Singaporeans & PRs from approved Financial Institutions.
2. Full information and payment must be completed before your registration is complete.
3. Declaration of information must be true and accurate. If there was any information that was found to be untrue which led to an unsuccessful IBF Funding claim, we reserve the right to claim the full course fees less any fees paid by the participant.
4. The IBF Enhanced Funding Support is subject to full attendance. We reserve the right to claim the disbursed course fee subsidy if there is non-attendance.
5. If the participant has started on the course and did not complete the course for whatsoever reasons, the participant shall be liable for the full course fee.
6. A standard fee of 4% of any refund amount will be charged to recover merchant fees for credit card transactions if there is any cancellation or transfer.
7. The GST component is not covered by any funding.

PROGRAMME DETAILS

Time: 9am — 5pm

Venue: Via Zoom

Payment: ***Bank Transfer, Cheque, Credit Card, PayNow.***
For Bank Transfer, kindly transfer to CIMB Bank 2000414299.
For Cheque, payable to "Precepts Academy Pte Ltd"
For Credit Card, we will send a payment link to your email address.
For PayNow, kindly transfer to UEN No. 199704239Z "Precepts Legacy Pte Ltd".

Registration closes **1 week before the start of the class** respectively.
You may register for the course at https://preceptsgroup.com/aepp/ or contact us at 6221 8633, academy@preceptsgroup.com for further information.

○ Apply for IBF Funding ○ Apply for SkillsFuture

PARTICIPANT'S DETAILS	
Full name: (as per NRIC)	
Surname:	
NRIC Number:	
Nationality: Singaporean/PR	
Email address:	
Contact Number:	
Mailing Address:	
Postal Code:	
Job Title:	
Company:	

^ Upon filling in your particulars to this form, you hereby acknowledge that you have read, and agree to the terms and cor
to this course registration.