

Frequently Asked Questions

Associate Estate Planning Practitioner (AEPP®) Certification Programme

1. What is the difference between AEPP® Certification programme and AEPP® Advanced Modules (collectively referred to as AEPP® courses)?

- The 2-day AEPP® Certification programme gives you an introduction into various estate planning topics and to learn the fundamental tools in estate planning i.e. wills and trusts. Upon successful completion of the course and examination, you will attain the AEPP® designation. This programme can help to upgrade your practice and equip you to confidently reach more individuals through estate planning. It gives you the practical knowledge, learning through case studies and you can add the AEPP® designation to build your credentials. You can refer to our course brochure available in our website <https://www.preceptsgroup.com/education/>
- Our range of AEPP® Advanced Modules will deep dive into specific topics relating to estate planning to enable you to build specialised knowledge. You can refer to the list of our AEPP® Advanced Modules in our website <https://www.preceptsgroup.com/education/>

2. What are the Associate Estate Planning Practitioner (AEPP®) Certification Programme objectives?

- Estate Planning is a powerful way to build and reinforce the trust and confidence your clients have in you for the long term. It complements and completes the Financial Planning journey which begins with Wealth Creation, progresses to Wealth Accumulation & Wealth Preservation and leads to Wealth Distribution.
- To gather practical knowledge about estate & succession planning, you would gather the basic knowledge and skills to assist in the Wealth Distribution part of your client's financial plan.
- There will be case studies in the class to make the learning more applicable to the real-life scenarios when you meet your client.

3. What are the course dates and timings? How do I register for the course?

- You can refer to PreceptsGroup website http://bit.ly/precepts_academy2021 for the latest available course dates and register for the course.

- Timings of the 2-day AEPP® Certification programme are as follow

Day 1	9.00am to 6.00pm (6 CPD hr)
Day 2 (Including 1.5 hr exam)	9.00am to 6.00pm (6 CPD hr)

4. What is the AEPP® Certification programme format of the training and examination?

- The training will be conducted via Zoom. You would need to turn on your video/ web camera throughout the training to show proof of attendance in compliance to the IBF Funding Support.
- The 1.5-hr examination will commence at the end of the course on Day 2 via an online link. You need to turn on your video/ web camera, unmute yourself and turn on your speaker during the exam as part of the invigilation requirement.

5. What are the CPD Hours for AEPP® Certification programme?

- Total training and examination awarded is 12 CPD hours and will be indicated on the electronic Certificate of Attendance.

6. What is the designation that I can include in my credentials after successful completion of the AEPP® Certification programme and passing the exam?

- AEPP® or Associate Estate Planning Practitioner can be included in your credentials like your name card or email signature. Please refer to the 'Use of AEPP Mark Guide 2021' located in EPPL website <https://epplasia.com/use-of-aepp-mark/>.

7. Who are the Certification bodies of the AEPP® designation?

- The accreditation of the AEPP® is awarded by the Society of Will Writers (SWW) of the United Kingdom and the Estate Planning Practitioners Limited (EPPL).

8. What if I fail the AEPP® Certification programme exam?

- There will be one (1) complimentary re-attempt within one week from exam date. If you failed this 2nd attempt, you will not be eligible for the IBF Funding and the full course fee will be collected from you.

9. What if I did not attend the full 2-day session of the AEPP® Certification programme?

- You will not be allowed to sit for the exam AND will not be eligible for the IBF Funding. The full course fee will be collected from you.

10. How much is the AEPP® designation fee and is it payable annually?

- There is a one-time lifetime AEPP® designation fee of \$300 + 7% GST (early bird discounted price at \$250 + 7% GST).

11. What is/ are the funding available for the AEPP® courses?

- AEPP® courses are approved as IBF Financial Training Scheme (FTS) courses. IBF and MAS will enhance course fee subsidies for locals attending accredited or recognised courses up to 90%.
- For training programmes commencing between 8 April 2020 and 31 December 2021 (both dates inclusive):
 - 90% of direct training cost*
- For training programmes commencing between 1 January 2022 and 30 June 2022 (both dates inclusive):
 - 80% of direct training cost* for Singapore Citizens below 40 years old and Singapore Permanent Residents
 - 80% of direct training cost* for Singapore Citizens 40 years old and above (i.e. born in year 1982 and before)

12. Can I apply for SkillsFuture Credit to pay for the balance course fee after IBF Funding?

- AEPP® courses are approved as IBF Financial Training Scheme (FTS) courses. SkillsFuture Credit (SFC) *cannot* be used to co-fund the programme fees of company-sponsored training programmes.

13. How much do I pay to register for the AEPP® Certification programme?

• IBF-FTS Approved Programme	• IBF Funding (Jan-Jun 2022)	
Pre-requisites to qualify: <ol style="list-style-type: none"> 1. Working in a Singapore-based financial Institution regulated by MAS 2. Singapore Citizen / SPR 3. Full attendance in class and pass exam 4. Physically residing in Singapore 	SG Citizens age 40 and above 90% IBF Funding Course Fee: \$1200 7% GST: \$84 10% Nett Fee: \$120 One-time fee for designation + 7% GST: \$250 + \$17.50 Payable per pax: \$471.50	SG Citizens below age 40 & Permanent Residents 80% IBF Funding Course Fee: \$1200 7% GST: \$84 20% Nett Fee: \$240 One-time fee for designation + 7% GST: \$250 + \$17.50 Payable per pax: \$591.50

- Precepts will file with IBF directly to claim the respective 80% or 90% IBF Funding.

14. How much of Training Allowance Grant (TAG) will I receive?

- AEPP® is under the IBF-Financial Training Scheme (FTS) where the participant's Financial Institution will administer the TAG claim.
- Company Sponsored Participants

Grant Amount	S\$10/hour of eligible training and assessment hours
Eligible FTS Courses	<ul style="list-style-type: none">• Commencing between 1 July 2021 to 30 June 2022 (both dates inclusive) Completed no later than 30 September 2022
Eligible Participants	Singapore Citizens or Singapore Permanent Residents, physically based in Singapore

TAG will only be disbursed to the eligible sponsoring company upon the participants' successful completion of the FTS programme including fulfilling the minimum attendance requirements and passing the relevant assessments, where applicable.

- For more information, you may refer to <https://www.ibf.org.sg/programmes/Pages/IBF-FTS.aspx>

15. I have attended the AEPP® Certification programme, can I attend a refresher course?

- There is no refresher course for the AEPP® Certification programme as the course is structured with the certification i.e., the exam and designation.
- You can register for our AEPP® Advanced modules to gain further knowledge on specific Estate Planning topics. You can refer to <https://www.preceptsgroup.com/education/> for more information on the Advanced modules.

16. Can I advise my clients on Wills and Trust services after completing and passing the AEPP® Certification programme?

- The AEPP® Certification programme offers the *Education* route which equips participants with the knowledge about estate & succession planning. Upon completion of the course and passing the exam, you are not able to advise on Wills and Trust services.

17. What can I do if I want to advise my clients on Wills and Trust services?

- To advise in the capacity as a practitioner, participants can embark on the *Specialist* route with us which include a 3-day in-depth Estate Planning, Wills and Trusts training plus a 2-day onboarding to know about Precepts range of products and services. At Precepts, we have the platform that will allow you to offer Estate Planning services to your clients. You can choose to come onboard as our Estate & Succession Practitioner (ESP).
- You can visit PreceptsGroup website <https://www.preceptsgroup.com/esp-programme/> for more information or to submit an enquiry.

18. Who do I contact if I have more questions regarding the AEPP® courses?

- You can contact Precepts Academy at academy@preceptsgroup.com or call us at 6221 8633.
- Our operations hours are:
 - Monday to Thursday: 9am to 6pm
 - Friday: 9am to 5pm
 - Weekends and public holidays: Closed

End of page