FREQUENTLY ASKED QUESTIONS

Associate Estate Planning Practitioner (AEPP®) Certification Programme

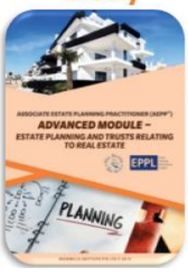
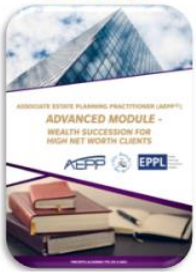
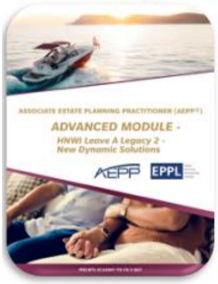
1. What is the difference between AEPP® Certification Programme and AEPP® Advanced Modules (collectively referred to as AEPP® courses)?

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 AEPP® Certification programme course brochure available in our website for more details 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. With the full range of AEPP® courses, you will be well equipped with the knowledge to put your estate planning service into practice.

The following is the list of Advanced modules currently offered. You can refer to the course brochures of the respective AEPP® Advanced Modules in our website for more details https://www.preceptsgroup.com/education/

Real estate	Businesses	High Net Worth	And more..
Estate Planning and Trusts relating to Real Estate **1 Day** 	Buy-Sell Arrangements for Non-family Businesses **1 Day** 	Wealth Succession for High Net Worth Clients **1½ Days** 	Digital estate and succession planning for wealth advisers **1½ Days** 
Wealth Transfer of Real Estate for Financial Services Professionals **2 Days** 	Multigen Wealth Legacy Planning and Family Offices **1½ Days** 	HNWI Leave A Legacy 2 - New Dynamic Solutions **1½ Days** 	Tax Planning in Wealth Mgt for Financial Services Professionals **1½ Days** 

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Associate Estate Planning Practitioner (AEPP®) Certification Programme

2. What are the learning objectives of the AEPP® Certification Programme?

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.

The course enables the participants to gather practical knowledge about estate & succession planning. You would gather the basic knowledge and skills to assist in the Wealth Distribution 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 clients.

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_academy2022 for the latest available course dates and register for the course via http://bit.ly/precepts_academy2022.

Timings of the 2-day AEPP® Certification programme is 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. How is the AEPP® Certification programme training conducted?

The trainings are currently 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 course requirement as well as to support your claim for IBF Funding *or* SkillsFuture credit.

5. How many training hours are awarded for the AEPP® Certification programme?

This course will also award you a total of 12 training hours (including examination) which will be indicated on the *electronic* Certificate of Attendance.

6. How is the AEPP® Certification programme examination conducted?

The 1.5-hr open-book examination will commence at the end of the course on Day 2 via an online link.

Section	Format	No of Questions	Total marks
A	Multiple Choice Questions	15	30
B	True/ False	10	30
C	Matching	10	20
D	Short Answer	4	20
The examination requires a minimum score of 60 marks out of 100 marks for a pass (60%)			100

During the examination, you are required to unmute your microphone, turn on your speaker and webcam/ video on your device, as part of the invigilation requirement.

7. 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 second attempt, you will not be eligible for the IBF Funding and the full course fee will be collected from you.

8. 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 AEPP® examination AND will not be eligible for the IBF Funding. The full course fee will be collected from you.

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

You can add the AEPP® designation in your credentials, such as your name card or email signature. Please refer to the 'Use of AEPP Mark Guide 2021' located in Estate Planning Practitioners Limited (EPPL) website https://epplasia.com/use-of-aepp-mark/.

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

The accreditation of the AEPP® is awarded by the following bodies:

- Society of Will Writers (SWW) of the United Kingdom https://www.willwriters.com/
- Estate Planning Practitioners Limited (EPPL) https://epplasia.com/.

11. How much is the AEPP® designation fee and is it renewable annually?

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

12. 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 01 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
- 90% of direct training cost* for Singapore Citizens 40 years old and above (i.e., born in year 1982 and before)

For training programmes commencing 01 July 2022 onwards:

- 50% of direct training cost* for Singapore Citizens below 40 years old and Singapore Permanent Residents
- 90% of direct training cost* for Singapore Citizens 40 years old and above (i.e., born in year 1982 and before)

Please refer to IBF website https://www.ibf.org.sg/programmes/Pages/IBF-FTS.aspx for more details on your eligibility to claim for IBF Enhanced Funding Support.

13. 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.

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

You can refer to the breakdown below. Precepts Academy will file your claim for the respective IBF Funding with IBF directly.

• IBF-FTS Approved Programme	• IBF Funding (Jan-Jun 2022)	
Pre-requisites to qualify: 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**

• IBF-FTS Approved Programme	• IBF Funding (Jul-Dec 2022)	
Pre-requisites to qualify:	**SG Citizens age 40 and above 90% IBF Funding**	**SG Citizens below age 40 & Permanent Residents 50% IBF Funding**
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	Course Fee: $1200	Course Fee: $1200
	7% GST: $84	7% GST: $84
	10% Nett Fee: $120	50% Nett Fee: $600
	One-time fee for designation + 7% GST: $250 + $17.50	One-time fee for designation + 7% GST: $250 + $17.50
	Payable per pax: **$471.50**	Payable per pax: **$951.50**

Email us at academy@preceptsgroup.com if you are not eligible for IBF Funding and would like to claim your SkillsFuture Credit for the course fee.

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

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

Company Sponsored Participants

Grant Amount	S$10/hour of eligible training and assessment hours
Eligible FTS Courses	• 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

16. I have attended the AEPP® Certification Programme, can I attend a refresher course?

The AEPP® Certification Programme is structured as a course accompanied by an examination which will lead to the successful completion of the programme. If you have previously completed the course and attained the AEPP® designation, you are not required to sit for the examination. In this instance, you will not be eligible to claim IBF funding for the course fee.

We will encourage you to 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.

17. 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.

18. 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 to register@preceptsgroup.com.

19. 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

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