PRECEPTS ACADEMY

ESTATE PLANNING, WILLS AND TRUSTS FOR FINANCIAL SERVICES PROFESSIONALS

PROGRAMME STRUCTURE 2022

ABOUT THIS PROGRAMME

This is structured to kickstart your knowledge in Estate Planning relating to **Wills and Trusts**.

In Singapore, estate planning is often done as an after-thought. With a greying population and growing affluence, there is an urgent need to reach out to the masses to act on planning their wealth distribution early.

Through this 3-day course, we would deep dive into the solutions and tools provided by estate planning. Our trainers are senior and qualified practitioners who are experienced and passionate in Estate Planning. They would be sharing their experience and practical skills to uncover gaps to provide a more thoughtful financial planning process.

There will be a Certificate of Attendance issued after the successful completion of the course and 18 hours will be accorded.

OBJECTIVES

Upon completion of this course ***Estate Planning, Wills and Trusts for Financial Services Professionals***, participants will be equipped with the essential skill sets and knowledge to engage clients in succession planning.

KEY LEARNING OUTCOMES

Participants will be able to:

- Introduce concepts and structures relating to wealth distribution and succession
- Discuss issues faced by the family that impact succession planning
- Explore critical issues relating to their individual family situation

3-DAY PROGRAMME OUTLINE

DAY 1

- Introduction to Estate Planning
- Overview of Estate Planning
- Intestate Succession Act
- Appointment of Administrator
- Application of Letter of Administration
- Circumstances where sureties are required
- Revocation of a Will

- Wills Consideration
- About the Testator
- Location of Assets & Attestation
- The duties of the Executor & Trustee
- Introduction to Estate Administration
- Grant of Probate vs Letter of Administration

- Guardian of Minor Children
- Beneficiaries
- Types of Specific Gifts – Movable & Immovable
- Insurance Nominations
- CPF Nomination
- Residuary Estate
- Testamentary Trust
- Digital Assets

DAY 2

- Singapore Real Estate
- Dealing with Cross-Border Assets
- Risk Management Aspects of Will Writing
- Custody Services
- Case Studies

DAY 3

- Introduction to Trust
- Differences between Will & Trust
- Parties to a Trust
- Categories of Trusts

- Purposes of creating a Trust
- Ways in using the Trust
- Applications of Life Insurance Trust
- Lasting Power of Attorney

- Planning Considerations
- Introducing, Facilitating and Creating Trusts
- Regulations of Trust Companies
- Quick look at Muslims
- Quick look at Persons with Special Needs

Mr Leong Mun Kid

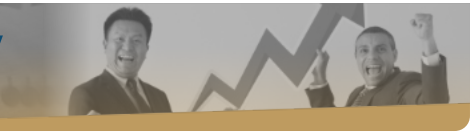
LLB (Hons)

- Mun Kid is the Head of Department, Trust for Precepts Trustee Ltd and is appointed as Resident Manager under the criteria set out by MAS for a licensed trust company.
- Mun Kid has been in the business of Estate Planning since 2011.
- He manages the setting up and administration of trust in Precepts Trustee Ltd.
- He assists clients in their estate and trust planning using onshore structure and offshore structures.

Mr John Sim

Certified Financial Planner (CFP®),
Associate Estate Planning Practitioner (AEPP®),
Masters of Science,
Computer Science and Information Systems

- John Sim is a passionate believer that education is key to achieving success in life. He acts out this belief through Eduvantage Pte Ltd, a social enterprise he founded in 2011 that conducts complimentary seminars in the areas of wealth optimisation, healthy living and relationship building.
- After graduating with an Honors (2nd Upper) degree in Computer Science and Information Systems from the National University of Singapore, he stayed on to teach in NUS for 2 years while concurrently earning his Master of Science degree.
- Since 2013, he has followed his passion for financial planning and embarked in a new direction by starting his financial advisory business.
- Through Eduvantage and his FA business, he aims to help improve the lives of people, with a focus on families with members who have special needs.



OUR INDUSTRY SPECIALISTS

Mr Ang Kok Chin

Certified Financial Planner (CFP®),
Associate Estate Planning Practitioner (AEPP®)

- With over a decade in the industry, Kok Chin is widely regarded as one of the top estate planners in Singapore. His career story mirrors his clients' financial journey and awareness — he started out advising clients on holistic financial planning but as more and more needed intimate advice on wealth transference to their children, Kok Chin honed his skills in estate and legacy planning.
- His experience and expertise shone through in 2016 when he sat for the Society of Trust and Estate Planners (STEP) Certificate for Financial Services – Singapore (Trust & Estate Planning) and graduated top of his class.
- Naturally, Kok Chin's clients are an impressive list of the who's who in Singapore and in the region. His work has seen him submerged in the estate planning for individuals with a net worth more than US$100 million.
- Kok Chin also manages wealth and succession planning for several successful business owners and entrepreneurs, with the aim of helping them grow their family wealth as it is being passed on from Generation to Generations.

COST AND HOW TO APPLY

Estate Planning, Wills and Trusts for Financial Services Professionals

Course Fee
$1,000 **Includes course manual**

*Precepts courses are approved under IBF- FTS. Participants can **ONLY** claim **ONE** funding under **EITHER** IBF-FTS **OR** use your SkillsFuture credit to offset the course fee.*

Institute of Banking & Finance Funding	SkillsFuture Credit
Enhanced Funding Support From 1st July 2022 • 90% Funding – Singapore Citizen 40 years old and above • 50% Funding – Singapore Citizen below 40 years old and Singapore PRs	Full course fee + 7% GST= $1,070 SkillsFuture Credit claimable through SkillsFuture portal, up to available balance.

IBF Programme Code: P220315ZHH

SkillsFuture Course Reference No.: TGS-2022013408

IBF-FTS Approved Programme	IBF Funding (From 1 Jul 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**	**SG Citizens below age 40 & Permanent Residents 50% IBF Funding**
	Course Fee: $1,000	
	7% GST: $70	
	10% Nett Fee: $100	50% Nett Fee: $500
	Payable per pax: **$170**	Payable per pax: **$570**

Terms & Conditions

1. IBF Funding Support of 90% is only for Singapore Citizens 40 years old (born in year 1982, regardless of which month) and above from Singapore-based financial Institutions regulated by MAS and physically residing in Singapore.
2. IBF Funding Support of 50% is only for Singapore Citizens below 40 years old and Singapore Permanent Residents from Singapore-based financial Institutions regulated by MAS and physically residing in Singapore.
3. Full information and payment must be completed before your registration is complete.
4. 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.
5. 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.
6. 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.
7. We allow one deferment of the course for valid reason (e.g. on medical ground with medical certificate). If the course is not attended by the next available course date, it will be deemed as cancelled by the participant and cancellation fee stated below will apply for any refund.
8. A standard fee of $53.50 will be charged for any cancellation. An additional 4% of the refunded amount will be levied for credit card transactions to cover merchant fees.
9. The GST component is not covered by any funding.

REGISTRATION

Time:	9am to 5pm
Venue:	Currently conducted online 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, make payment at https://mypayment.preceptsgroup.com/#c

For PayNow, kindly transfer to **UEN No. 200917180Z Precepts Academy Pte Ltd**

Registration closes 1 week before the start of the class.
The hardcopy training materials will be delivered to the delivery address indicated.

To Register:

If you are working in a Financial Institution and using IBF-FTS Funding	If you are not working in a Financial Institution and using SkillsFuture
Please register at https://bit.ly/precepts_esp2022	Please register at http://bit.ly/precepts_public

Feel free to register there directly and we will contact you for further details to complete your registration.

Contact Details:

+65 6221 8633
marketing@preceptsgroup.com

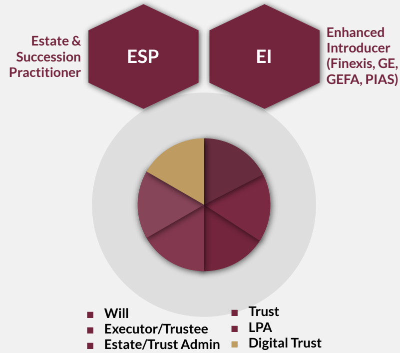
What's next after the 3-Day Course?

Knowledge	Practitioner

AEPP® Advanced

- Trust relating to Real Estate
- Wealth Transfer of Real Estate
- Business Owners Buy-Sell
- Wealth Succession for HNW
- HNW New Dynamic Solutions
- Multigen and Family Offices
- Digital Estate Planning
- Charitable and Philanthropic planning
- Tax Planning In Wealth Management

Full Range



Website:
https://www.preceptsgroup.com/education/

Email:
academy@preceptsgroup.com

Register:
http://bit.ly/precepts_academy2022

Website:
https://www.preceptsgroup.com/onboarding/

Email:
register@preceptsgroup.com

Register:
https://bit.ly/precepts_esp2022