
# 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://www.preceptsgroup.com/education/

# 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. Johann Tay

Johann Tay is an AEPP® designee and a Senior Estate and Succession Practitioner of Precepts Legacy Pte Ltd.

He specializes in Will & Trust solutions for all spectrums of society and operates his estate planning advisory as part of Will & Legacy, a family business, since 2012.

Johann believes that everyone deserves an estate plan, regardless of their background, and each experience better equips him to serve the still-living. His consults are diagnostic in nature, customizing a solution based on a client's circumstance and position in life.

Johann frequently conducts trainings and seminars for the public and professionals to educate and equip them to craft a lasting legacy for themselves. Notable engagements include Boeing, M1, Singtel, Mapletree, Oracle and FPAS.

# 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

*Total cost of the AEPP® Certification Programme consists of both the course fee and designation fee components.*

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

*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** commencing 01 July 2022<br>• 90% Funding – Singapore Citizen 40 years old and above<br>• 50% Funding – Singapore Citizen below 40 years old and Singapore PRs | Full course fee + 7% GST= $1284<br>SkillsFuture Credit claimable through SkillsFuture portal, up to available balance. |

**• IBF-FTS Approved Programme • IBF Funding (commencing 01 July 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<br>2. Singapore Citizen / SPR<br>3. Full attendance in class and pass exam<br>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:<br>$250 + $17.50 | One-time fee for designation + 7% GST:<br>$250 + $17.50 |
| | Payable per pax:<br>**$471.50** | Payable per pax:<br>**$951.50** |

**IBF Programme Code: P220407THE**

| | | | | |
|---|---|---|---|---|
| **Period** | Commencing Between **01 Jul 2022 - 31 Dec 2022** (Both dates inclusive) | | Commencing **01 Jan 2023** | |
| **Training courses** | Completed no later than 31 Mar 2023 | | | |
| **Eligible Individuals** | Singapore Citizens aged **below 40 years and PRs** | Singapore Citizens aged **40 years and above** | Singapore Citizens aged **below 40 years and PRs** | Singapore Citizens aged **40 years and above** |
| **Funding Amount For Direct Training Costs** | **50%** capped at S$2,000 per participant per course | **90%** capped at S$2,000 per participant per course | **30%** capped at S$500 per participant per course | **70%** capped at S$500 per participant per course |

# PROGRAMME DETAILS

**Time**: 9am – 6pm (Day 1)
9am – 6pm (Day 2)

**Venue**: Via Zoom

**Register:**
You may register for the course at https://www.preceptsgroup.com/education/

Registration closes 1 week before the start of the class.

**Payment: Bank Transfer, Cheque, Credit Card, PayNow.**

1. For Bank Transfer, kindly transfer to CIMB Bank 2000414299.
2. For Cheque, payable to "Precepts Academy Pte Ltd".
3. For Credit Card, we will send a payment link to your email address.
4. For PayNow, kindly transfer to
   UEN No: 200917180Z "Precepts Academy Pte Ltd"

**Contact**: We are contactable at 6221 8633 or academy@preceptsgroup.com

## 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.

# THE PRECEPTS JOURNEY

## Primary

### Knowledge

| Associate Estate Planning Practitioner Certification Programme | Estate Planning, Wills & Trusts for Financial Services Professionals |
|---|---|
| AEPP® 2-Day<br>AEPP® Designation | Wills & Trusts 3-Day |

## Secondary

| Knowledge | Practitioner |
|---|---|

### Knowledge

AEPP® Advanced

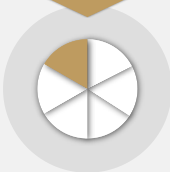
- Trust relating to Real Estate
- Wealth Transfer of Real Estate
- Business Owners Buy-Sell
- Wealth Succession for HNW
- HNW New Dynamic Solutions
- Multigen and Family Offices
- Digital Estate Planning
- Charitable and Philanthropic planning
- Tax Planning In Wealth Management

### Practitioner

**2-Hour Briefing**

Specific

Digital Trust Introducer: DTI

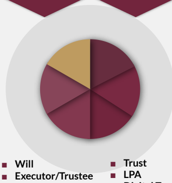



**2-Day Onboarding**

Full Range

Estate & Succession Practitioner: ESP

Enhanced Introducer (Finexis, GE, GEFA, PIAS): EI




| Route | AEPP® 2-Day | Wills & Trusts 3-Day |
|---|---|---|
| **Purpose** | • Certification<br>• Knowledge<br>• AEPP® designation | • Certification<br>• Knowledge |
| **Objective** | **Introduction** to various Estate Planning topics | **Deep-dive** into the solutions provided by **Wills & Trusts** |
| **Course Fees** | Course Fee: $1,284<br>+ Designation Fee: $267.50 | Course Fee: $1,070 |
| **SkillsFuture** | Up to available credits, cap $1,000 | Up to available credits, cap $1,000 |
| **IBF-FTS Funding** | IBF 50% or 90% (commencing 01 Jul 2022) | |
| **Fees payable after IBF-FTS Funding** | IBF 50% : **$951.50* net fee**<br>IBF 90% : **$471.50* net fee** | IBF 50% : **$570* net fee**<br>IBF 90% : **$170* net fee** |
| **Estate Planning needs** | Referral | Referral, unless proceeding to Part 2: Onboarding Precepts |
| **Exam** | 1.5-hour exam, MCQ & short answer questions | - |