PRECEPTS
LEGACY

ONBOARDING AS A PRACTITIONER ON THE PRECEPTS PLATFORM

INTRODUCTION OF ESTATE PLANNING FROM A PERSONAL PERSPECTIVE

As a person planning for your own Estate Plan

With a greying population and growing affluence of residents in Singapore today, there is a greater need to plan for the proper transfer of wealth to the next generation.

With the unpredictable environment we are in, it is important to take the time now to pen down our intentions while we have a sound mind.

Assist your Family and Clientele base to:

- Protect Assets from Mismanagement
- Maintain Privacy of Your Family's Wealth
- Reduce Conflicts between Beneficiaries
- Complete your Estate Plan at a steep discount
- Create and maintain a Family Bank
- Creditor Protection
- Prevent Squandering of Wealth
- Protect Vulnerable Beneficiaries from undue influence and predatory persons
- Keeping Hard-Earned Monies within the Family
- Achieve Family Goals and Promote Family Values
- Plan for Business Succession or Exit Arrangement
- Stretch one's legacy for rightful causes

Considerations on a personal level

Have you:

- Put everything down in writing with clear instructions to avoid potential conflicts and misunderstanding for your loved ones?
- Considered if there are any beneficiaries who are immature or not financially savvy to deal with the sudden wealth?
- Appointed the key persons in your Will to deal with consolidating and distributing your assets?
- Appointed a trusted person to take care of your child/children?

INTRODUCTION OF ESTATE PLANNING FROM A BUSINESS PERSPECTIVE

As a Professional

Planning for one's wealth distribution is usually done as an afterthought for most clients. It is usually done only when something happens to someone around them, or when they have someone to hand hold them through the whole process.

Stand out in the market with the know-how to create a holistic plan and fulfil your client's wishes beyond their lifetime.

Upskill yourself and Upscale your business

- In-depth Knowledge of Comprehensive Estate Planning
- Understand Clients from Mass Affluent to Ultra High-Net-Worth
- Penetrate in a blue ocean market
- Revisit existing clientele base with a new conversation
- Family Focused
- Extend your services beyond your core business
- Planning beyond one's lifetime to create more opportunities
- Identify gaps and loopholes
- Provide Holistic Solution
- Create natural referral sources through Estate Planning
- Become a Specialist with continuous learning
- Build up on your Personal Brand

Considerations on a business level

Do you have:

- The resources and support to assist your clients?
- An access to an estate planning platform to upskill yourself and upscale your business?
- The strategies to create natural referrals?
- The end-to-end solutions to provide for all 4 quadrants of Wealth?

ADD-ON

ONBOARDING PRECEPTS TO EXTEND YOUR SERVICES TO INCLUDE ESTATE PLANNING SOLUTIONS + Add-on

2-DAY ONBOARDING PROGRAMME OUTLINE

Day 1

- Structure of eWill Writing Form (eWIF)
- Case Study + Practice eWIF
- Onboarding Process (Administration)
- Submission Workflow
- Attestation Workflow
- Will Custody Services

Day 2

- Trust Introducer Activities
- Product & Services in Precepts Trustee
  - Standby Trust
  - ProviTrust
- Marketing your services as an ESP
- Utilising the Precepts Platform
- Exam

PRECEPTS PLATFORM

Empowers you to hand-hold your client directly throughout the whole estate planning process.

Be the holistic professional that provides a total solution to your clients.

OBJECTIVES

PERSONAL

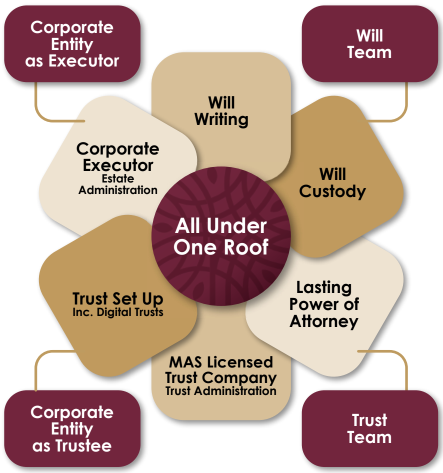
- Discount on your Will/Trust
- Same discount for your spouse
- Create additional streams of income

Immediate	Recurring	Deferred
Will	Trust Administration	Estate Administration
Trust	Custody	
LPA		
Digital Trust		
Custody		

BUSINESS

- Leverage on Precepts' support & expertise
- Access our library & training to hone your knowledge & skills
- Build your brand & range to reach a wider audience

ESTATE PLANNING SOLUTIONS



Precepts is the only firm in Singapore to offer these services all under one roof, bringing convenience to you and your clients.

End Result:

As our Estate & Succession Practitioner, you will learn to identify blind spots, planning gaps and handhold your clients to act on completing their Will/Trust/LPA.

PRECEPTS SUPPORTS YOU
IN YOUR ESTATE PLANNING JOURNEY

Client Relationship
- Estate Planning Talks
- Estate Planning Forum

Achievement
- Kickstart & Awards Presentation
- Overseas Business Networking Trips
- Executive Club (Top 15)

Support
- Access to all services under one roof
- Access to Wills Team
- Access to Trusts Team
- Complimentary booking of our meeting rooms
- Corporate Seminar Support

Knowledge
- Refresher on Wills & Trusts Training
- Sharing Sessions by Experienced Practitioners
- Professional Series for further development & networking

Skills
- Sales Booster Trainings
- Bi-weekly discussions

THE PRECEPTS JOURNEY

Primary

Knowledge

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

Secondary

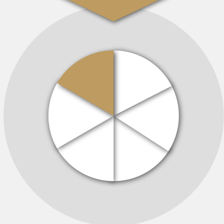
Knowledge

AEPP® Advanced

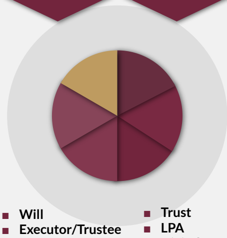
- Trust relating to Real Estate
- Wealth Transfer of Real Estate
- Business Owners Buy-Sell
- Wealth Succession for HNW
- Charitable and Philanthropic planning
- Tax Planning In Wealth Management

Practitioner

2-Hour Briefing	2-Day Onboarding
Specific	**Full Range**
DTI – Digital Trust Introducer	ESP – Estate & Succession Practitioner EI – Enhanced Introducer (Finexis, GE, GEFA, PIAS)



- Digital Trust



- Will
- Executor/Trustee
- Estate/Trust Admin
- Trust
- LPA
- Digital Trust

THE PRECEPTS JOURNEY

	Primary	
	Knowledge	
Route	AEPP® 2-Day AEPP® Designation	Wills & Trusts 3-Day
Purpose	• Certification • Knowledge • AEPP® designation	• Certification • Knowledge
Objective	**Introduction** to various Estate Planning topics	**Deep-dive** into the solutions provided by **Wills & Trusts**
Course Fees	Course Fee: $1,296 + Designation Fee: $270	Course Fee: $1,080
SkillsFuture	Up to available credits, cap $1,000	Up to available credits, cap $1,000
IBF-FTS Funding	IBF 30% or 70% (Cap $500)	
Fees payable after IBF-FTS Funding	IBF 30% : **$1,206** IBF 70% : **$1,066**	IBF 30% : **$780** IBF 70% : **$580**
Estate Planning needs	Referral	Referral, unless proceeding to Part 2: Onboarding Precepts
Exam	1.5-hour exam, MCQ & short answer questions	-

*Refer to https://www.ibf.org.sg/programmes/Pages/IBF-FTS.aspx for information on IBF-FTS funding requirements
*You can use either SkillsFuture credits or IBF Funding.

Secondary			
	Practitioner		
Route	Wills & Trusts 3-Day 2-Day Onboarding		AEPP® 2-Day AEPP® Designation Wills & Trusts 3-Day 2-Hour Briefing
	Estate & Succession Practitioner (ESP)		Digital Trust Introducer (DTI)
Purpose	• Extend your services to include **full range of estate planning solutions** ◦ **Wills, Trusts, LPA, Executorship, Trusteeship, Digital Trust** • Access to the Precepts Platform – **Full Range** • Hand-hold your client from **start to end**		• Extend your services to include specifically **digital trust** solutions • Access to the Precepts Platform – **Specific Product** • Hand-hold your client for **CPF Nomination to a Trust** • Provide a **quick-fix** solution of lump-sum CPF payout
Objective	Differentiate yourself as a holistic adviser		Provide a trust solution not covered by a Will
Pre-requisites	3-Day Wills & Trusts Course		AEPP® Certification / 3-Day Wills & Trusts
Onboarding Fees (Within 3 months)	**Public**	**B2B (Finexis, GE, GEFA, PIAS)**	**Public / B2B**
	2-Year : $885.60 3-Year : $1,490.40 5-Year : $2,700	2-Year : $669.60 3-Year : $1,166.40	AEPP® 3-Year : Waived for 1st 3 years 3-Day 3-Year: Waived for 1st 3 years
Renewable	Yes		Yes
Relationship	Access to Library of Resources & Documents		Access to Digital Trust Docs & Resources only
Create Additional Income Stream	Full fee-sharing structure Payable to you/B2B firm directly		Fee-sharing on Digital Trust solutions only Payable to you/B2B firm directly
Exam	1h 15min exam, 55 MCQ		30-min exam, 10 MCQ
Exclusive Discount (You & Spouse)	Will - 70% Trust - 50% Custody - 40% ProviTrust - 70%		ProviTrust - 70%

ONBOARDING PRECEPTS

PLATFORM FEES

Extending your services to include Estate Planning

Upon completion of 3-Day Estate Planning, Wills & Trusts for Financial Services Professionals, you have a choice of licence years with Precepts to provide wills, trust solutions, inclusive of all items mentioned in Precepts Platform.

Source	Onboarding Fees		
	2-Year	3-Year	5-Year
Public	**$885.60**	**$1,490.40**	**$2,700**
B2B Partners: Finexis, GE, GEFA, PIAS	**$669.60**	**$1,166.40**	**-**

*The onboarding fees reflected above include:

- 2-Day onboarding class
- the relevant year of licence fees
- Professional Indemnity Insurance
- 8% GST

PRE-REQUISITES BEFORE ONBOARDING

☑ Registered at https://bit.ly/precepts_academy2023 and completed 3-Day Estate Planning, Wills and Trusts for Financial Services Professionals

☐ Register to onboard within 3 months of completion of above course at https://bit.ly/onboarding_precepts2023
*Additional admin fees of $54 will be imposed for onboarding after 3 months.

Who is Precepts?

PRECEPTS CORPORATE SERVICES
Offshore Company Incorporation Services
Corporate Secretarial Services

PRECEPTS INCORPORATIONS
Local Company Incorporation Services
Corporate Secretarial Services

PRECEPTS TRUSTEE
Trust Set Up
Corporate Trustee - Trust Administration
Corporate Executor - Estate Administration

PRECEPTS ACADEMY
AEPP® Certification
Estate Planning Courses

PRECEPTS LEGACY
Will Writing
Will Custody

PRECEPTSGROUP INTERNATIONAL 启盛集团

EPPL
International Certification Body

EPPL DIGITAL
Digital Trusts

PRECEPTS TRUSTEE
- $2B: More than S$2 billion Assets Under Trust
- Set Up more than 1,000 Living Trusts
- More than 9,000 Corporate Executor & Trustee Appointments
- More than 500 LPA Form 2 Donee Appointments

PRECEPTS LEGACY
- More than 15,000 customised Wills written
- Safe Keeping of the Will
- Access to Precepts Platform for Estate & Succession Practitioners
- Support for Estate & Succession Practitioners

PRECEPTS CORPORATE SERVICES
- Offshore Incorporations

PRECEPTS INCORPORATIONS
- Local Incorporations

PRECEPTS ACADEMY
- AEPP® Certification
- AEPP® Advanced Modules
- Will & Trust Course

EPPL Estate Planning Practitioners Limited
- More than 6,500 AEPP® Designee Holders across Asia

EPPL Digital
- Digital Trusts Platform
- Support for Digital Trust Introducers