

ESTATISAN WORKSHOP

Planning for Specific Client Demographics

Objective:

Estate planning is not only for the high net worth or business owners. Many among the masses and mass affluent are also in need of sound advice.

Understand the key needs of the different spectrums of society so that you can provide more succinct advice to more of your clients, rather than the select few.

Content:

- Who are the “high risk” demographics: Singles, Families of divorce, Expat, LGBTQ
- Key red flags and blind spots that need to be addressed.

WORKSHOP

**Date:**

27th June 2024, Thursday

**Time:**

9.30am – 11.30am

**Venue:**

PreceptsGroup Office
10 Anson Road, #06-17
International Plaza Singapore 079903

\$10.90 per pax

To promote confirmed attendance,

- Only ESPs/EIs with a valid licence are allowed to register for this workshop.
- Strictly no refunds for no show
- Drinks and snacks will be provided.
- A Precepts folder with presentation materials will be provided.



Conducted by

JOHANN TAY

AEPP®

Senior Estate and Succession Practitioner

Helping from Will & Legacy, a family business, Johann specialises in Will & Trust solutions for all spectrums of society. Will & Legacy is currently the largest Estate & Succession Practitioner agency in PreceptsGroup Singapore.

Convicted that everyone deserves an estate plan, no matter their background, his consults are diagnostic in nature, customizing a solution based on a client's circumstance and position in life, rather than solely on their net worth.

Johann is frequently invited to speak to the public and professionals to educate and equip them to craft a lasting legacy for themselves. Notable engagements include Boeing, M1, Singtel, Mapletree, Oracle, FPAS among others.

Register Here

<https://bit.ly/estatisan>



Scan to register!



PRECEPTSGROUP
INTERNATIONAL

启盛集团