

ESTATISAN WORKSHOP

Gaining Mastery in Estate Planning for Financial Consultants

Introduction:

1. Learn how to incorporate Estate Planning seamlessly with your advisory process.
2. Level up your Advisory Business with Unique Advantage
3. Leverage on your Existing Clients for more Opportunities

Content:

- Techniques for clearly explaining Precepts' fees to ensure client understanding and acceptance.
- Building trust and rapport to encourage prospects to share financial information willingly.
- Overcoming objections and easing concerns about fees and financial disclosure.

WORKSHOP

**Date:**

10th September 2024, Tuesday

**Time:**

2.30pm – 4.30pm

**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

Eugene Soo

Eugene Soo is a well-respected estate planner and legacy trainer serving high-net-worth individuals in Singapore. With over 12 years of experience in the financial advisory industry, he has successfully set up more than 200 family and business trusts. His dedication and expertise have earned him multiple Top Trust Producer Awards, reflecting his commitment to excellence in estate planning.

Register Here

<https://bit.ly/estatisan>



Scan to register!



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