

ESTATISAN WORKSHOP

Navigating Your Legacy: Real-Life Lessons in Estate Planning



Objective:

Discover the art of estate planning through real-life case studies and expert guidance. Gain essential knowledge and strategies to navigate legal complexities, ensuring your clients' legacies are preserved with confidence and compassion. Ideal for professionals seeking to enhance their expertise in guiding clients through crucial financial decisions.

Content:

- Estate Planning Education
- Sharing of Real-Life Cases & How it impacted the Business
- Leading clients into Estate Planning



Conducted by

ZENN LEE

Zenn Lee, an Estate and Succession Practitioner, was the Top Rookie for Year 2023. With 18 years of experience in financial advisory, she has managed to help clients to kick start their Estate Planning journey and solidifying the client-planner relationship.

WORKSHOP



Date:
27th August 2024, Tuesday



Time:
2.30pm – 4.30pm



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

Register Here

<https://bit.ly/estatisan>

\$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.



Scan to register!



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