AEPP® | EPPL Estate Planning Practitioners Limited

Organised By: PRECEPTS ACADEMY

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®)

ADVANCED MODULE

CHARITABLE AND PHILANTHROPIC PLANNING FOR WEALTH ADVISERS

Charitable and Philanthropic in the present

Charitable giving and Philanthropy are increasingly part of the legacy landscape when clients do their estate and succession planning, especially for High Net Worth Individuals and families. Charitable and Philanthropic giving are being considered to boost the credibility and image of clients and their organizations, making it more beneficial for fundraising initiatives and brand image.

Financial practitioners who serve or aspire to serve clients in charitable and philanthropic causes must prepared to grasp their values, objectives, expectations, and be aware of the solutions that they can offer them.

This course will explore the landscape of charitable and philanthropic giving and the approaches in giving. The focus is on the clients thinking about how they want to be remembered; what causes, people and organisations who are important to them; what assets they want to protect and share; taking stock of their achievements, involving their family in the discussion and planning as well as to determine the structure of their contribution.

Co-Trainer: Lee Chiwi

Lee Chiwi is the Chief Executive Officer of PreceptsGroup International Pte Ltd and Chairman of Estate Planning Practitioners Limited (EPPL). He was admitted as an Advocate & Solicitor of Singapore in 1988.

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.

Co-Trainer: Jane Binks

With a deep knowledge of the charity sector and donor landscape, Jane has been a trainer, panelist, and moderator for numerous organisations. She was a panel speaker addressing a group of 160 Financial Services practitioners in the *Estate Planning & Wealth Succession Asia Forum* where she delved into the philanthropy trends and developments in Singapore and globally.

She holds a Master’s in Management, Economics and Politics, from the University of St. Andrews, and a Bachelors in English Literature from the University of California, Santa Cruz.

Co-Trainer: Yvonne Tan

Yvonne Tan is the Group Legal Counsel with PreceptsGroup International Pte Ltd. She holds a Bachelor of Laws (LLB) Hons from the National University of Singapore and was admitted to the Singapore Bar in 1985.

She has 10 years of work in management and governance of charity/ IPC as part of the governing board in Charitable organization. She has served extensively in community services.

Up till 2021, Yvonne served as a Board Member of the Kampong Kapor Community Services (KKCS), a social service organisation which is a member of the National Council of Social Services and an Institution of a Public Character.

COURSE COVERAGE:

- **Philanthropic landscape and approaches to giving**
  - Rationales in charitable and philanthropic giving
  - Taxation aspects of giving

- **Regulatory framework governing charitable organisations**
  - The type of charitable bodies and how these are managed via the governing instruments
  - Management and governance of Charities

- **Working with clients**
  - Identifying clients' needs and interests
  - Develop a resource tool kit
  - Create a legacy giving strategy
  - Identifying tax issues, tax benefits, tax treatment and tax exemptions
  - Case study to learn how to craft effective succession plans using illustration and in-depth discussion

Please note that this is an Advanced Module. Participants should be familiar with basic Estate Planning, Wills and Trust concepts and structures. Participants are **strongly encouraged to have completed at least one of the following** before attending this module:

a. AEPP®
b. Precepts Estate Planning, Wills and Trust 3 Days Course
c. Similar courses

CPD Hours:	12 hours

Covered Persons who successfully complete this course can use it to count towards the fulfilment of the non-STS portion of the annual CACS CPD requirement.

Duration:	
DAY 1	9 am – 5 pm
DAY 2	9 am – 4 pm

Register here

https://www.preceptsgroup.com/course/

COURSE FEE

$1,200
Includes course manual

- **IBF-FTS Approved Programme**
- **IBF Funding (commencing 01 Jan 2023)**

Pre-requisites to qualify for IBF Funding:

1. **Working in a Singapore-based financial Institution regulated by MAS**
2. **Singapore Citizen / SPR**
3. **Physically residing in Singapore**

SG Citizens age 40 and above 70% IBF Funding	SG Citizens below age 40 & Permanent Residents 30% IBF Funding
Course Fee: $1,200	Course Fee: $1,200
9% GST: $108	9% GST: $108
70% Funding: $500 (cap)	30% Funding: $360
Net Fee Payable: **$808**	Net Fee Payable: **$948**

This course is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met.

Please note that in no way does this represent an endorsement of the quality of the training provider and course. Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S$500 per candidate per course subject to all eligibility criteria being met.

Find out more on www.ibf.org.sg.