Organised By:

PRECEPTS ACADEMY

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®)

CERTIFICATION PROGRAMME

The Associate Estate Planning Practitioner (AEPP®) is a practical and marketing-based course for Professional Advisers wishing to use estate planning to enhance their core advisory services. Since 2009, this certification programme has been addressing the growing needs of the mass affluent and High Net Worth Individuals for a comprehensive discussion on estate and succession planning in Asia.

The programme has benefited more than 7000 practitioners in Asia within the banking and financial planning industry as they are now equipped with knowledge of an important topic that expands their advisory scope.

Our dynamic and experienced course trainers have plenty of insights to share with participants on how to use estate planning to energise and supercharge their advisory business.

Upon completing the two-day course, participants will be able to include the AEPP® designation to their credentials.

The Associate Estate Planning Practitioner (AEPP®) designation is awarded by The Society of Will Writers (SWW) of the United Kingdom and the Estate Planning Practitioners Limited (EPPL).

Trainer:

Alan Wong

AEPP®, AFP©

Alan Wong is the Principal Consultant of W3 Consultancy Pte Ltd which provides training and consultancy services in the specialised field of Business Protection Planning. He has won awards for the Trust businesses he has completed.

He has trained numerous financial consultants from insurers as well as IFAs. A financial consultant himself with more than 15 years of experience, he focuses his practice on planning for Business Owners using estate planning. He is highly effective in penetrating this market and often able to win over clients from banks and other intermediaries who serve the Ultra HNW individuals and business owners.

Trainer:

Johann Tay

AEPP®

Johann Tay is a Senior Estate and Succession Practitioner of Precepts Legacy Pte Ltd. He specializes in Will & Trust solutions for all spectrums of society and operates his estate planning advisory as part of Will & Legacy, a family business, since 2012. Johann believes that everyone deserves an estate plan, regardless of their background, and each experience better equips him to serve the still-living.

His consults are diagnostic in nature, customising a solution based on a client's circumstance and position in life.

Johann frequently conducts trainings and seminars for the public and professionals to educate and equip them to craft a lasting legacy for themselves. Notable engagements include Boeing, M1, Singtel, Mapletree, Oracle and FPAS.

Trainer:

Darren Tan

(ChFC®/S), TEP, AEPP®

Darren is a passionate believer to lifelong learning and it has led him to become a qualified practitioner in legacy planning. Since 2013, he has shared his knowledge through training programs on Estate Planning.

Today, Darren continues to mentor aspiring entrepreneurs and remains passionate about financial planning and legacy planning. His dedication to education and professional development is evident in his successful career journey.

Darren qualified as a TEP since 2021 (Trust and Estate Practitioner) from the renowned STEP, which is a global professional body, comprising lawyers, accountants, trustees and other practitioners that help families plan for their futures.

COURSE COVERAGE:

Practical Aspects of Estate Planning

- Introduction to Estate Planning
  - Intestate Laws of Singapore
- Life Cycle of Wealth
- The tools of Estate Planning
  - Wills, Nominations, Trusts, Joint Assets
- Estate Planning creates opportunities for Sales
- Estate Planning with Fund Creation
- Introduction to Business Succession Planning

Estate Planning for the Mass Affluent and High Net Worth Individuals (HNWI)

- Mass Affluent Estate Planning
- Estate Planning for the Elder Client
- Inheritance and Concepts involved in Wealth Perpetuation
- Estate Planning instruments for HNWI
- Case Studies and Planning

This course requires participants to complete an electronic 2 hour assessment to be awarded the AEPP® Designation. Terms and Conditions apply.

CPD Hours:	14 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 – 6 pm
DAY 2	9 am – 6 pm

Register here

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

COURSE FEE

$1,200
Includes course manual and assessment fee

Lifetime Designation (AEPP®) Fee	
Standard Rates	**$300**
Early Bird Rates (payment made before class commerces)	**$250**

The Designation Fee is payable for only one time.

- **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 <u>below</u> 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
One-time fee for Designation + 9% GST: $250+$22.50	
Net Fee Payable: **$1,080.50**	Net Fee Payable: **$1,220.50**

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.