ONBOARDING AS A PRACTITIONER ON THE PRECEPTS PLATFORM

PRECEPTS
LEGACY

Become a Practititioner!
Scan here for more information

Be Our
Estate & Succession Practitioner (ESP)

Precepts offers a comprehensive range of estate and legacy planning services under one roof. This integrated approach ensures that our clients receive consistent, professional, and efficient support across all areas of their planning journey.

With dedicated teams in both Will and Trust services, and the option to appoint us as a Corporate Executor or Trustee, Precepts delivers unmatched convenience and peace of mind for our Practitioners and the clients they serve.

Ideal for Individuals Who Are:

- A Financial Adviser or Property Agent wishing to expand your advisory breadth
- A home maker wishing to earn an additional household income
- Looking to earn an additional income on top of your existing job
- Looking for a career switch
- Any professionals wishing to gather more knowledge in estate planning

Your Journey
as a Precepts Practitioner

We recommend all participants to onboard within 3 months of completing the 3-Day Wills & Trusts Course.

Platform Fees & Onboarding Course Highlights

Prices are inclusive of GST	Public	B2B#
Duration (9 am – 5 pm)	2 Days	
CPD Hours	Nil	
Onboarding Fees (2-Year)	$981.00	$828.40
Onboarding Fees (3-Year)	$1,406.10	$1,177.20
Onboarding Fees (5-Year)	$2,234.50	-
Exam	1 hr 15 mins, MCQ	

Course Highlights

Day 1

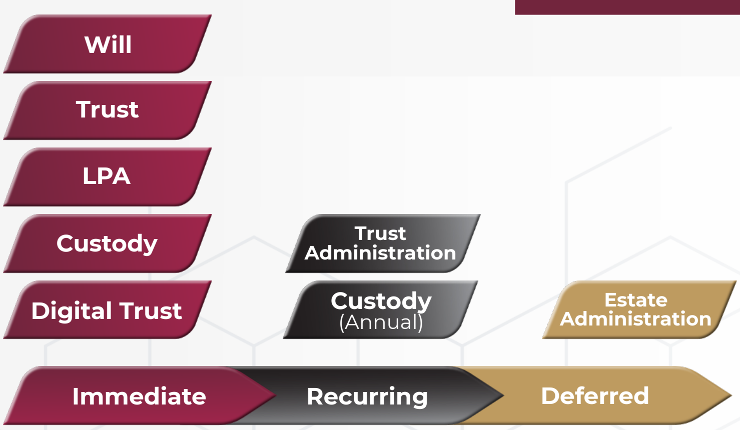
- Will Case Studies of 4 common types of client's profiles
- Submission & Attestation process
- Use of Precepts platform

Day 2

- Trust products
- Marketing support for Practitioners

*Terms and Conditions apply, # finexis, GE, GEFA, PIAS

Additional Income Stream



Should a client designate Precepts as their Executor or Trustee, an annual administration fee will be charged upon their passing or mental incapacity.

This arrangement allows Practitioners to earn ongoing or deferred annual commissions as long as their licence is still active.

Your Entitlement

Continuous Training and Support

Exclusive Classes	1. Workshops by experienced Practitioners 2. Workshops by internal and external industry experts 3. Wills and Trusts Refresher Course	1
Client Seminars	1. Seminars with various topics held monthly	2
Starter Kit	1. Precepts Name Card 2. Training Booklets 3. Brochures 4. Access to our Presentation Slide Decks 5. Access to a Library of Resources and past talks/sharing series 6. Discount vouchers for you and your spouse	3
Platform	1. Practitioner's portal for chatbot, documents, videos and room bookings 2. Will Instructions Platform	4

Services Provided and Renumeration

Additional Income Streams	1. Immediate Stream 2. Recurring Stream 3. Deferred Stream	5
Direct access to Precepts Products and Services	1. Consultation for Will writing 2. Safekeeping of Will in a secured facility 3. Trusts Set up 4. Professional Executorship/Trusteeship 5. Lasting Power of Attorney Form 2 6. Setting up of Singapore & offshore companies	6

Frequently Asked Questions

How do I assist my clients as a Practitioner?

Access to our platform

- ▶ Plot your client's wishes into our Will Instructions Platform
- ▶ Consultations with seniors
- ▶ Wills and Trusts Team will draft out the submitted Wills or Trust instructions

Confirmation of services

- ▶ Client reviews draft and make amendments
- ▶ Services confirmed
- ▶ All parties to sign on confirmed documents

Commission

- ▶ Client makes final remainder payment
- ▶ Practitioner receives renumeration

Q **Can I become a Practitioner without attending the AEPP® Certification Programme?**

A Yes you can! The only course required to be completed before Onboarding as our Practitioner is the 3-Day Wills & Trusts foundation course.

Q **What is the difference between the AEPP® Certification Programme and 3-Day Wills and Trusts course?**

A The AEPP® Certification Programme incorporates marketing and sales components within the context of Estate Planning, enhancing participants' ability to communicate effectively with clients. Successful graduates of the programme are awarded the AEPP® designation, which is granted for life.

The 3-Day Wills and Trusts course provides an in-depth look at the technical aspects of Estate Planning, with a special focus on the key details involved in creating a Will and Trust.

Q **Can I write Wills for my clients after becoming a Practitioner?**

A Rather than writing the Will, you will be able to directly advise and manage your client's Estate Planning wishes via the Wills Instruction Form. All Wills are drafted by Precepts' Wills drafting team after the submission of the form.

Q **When does my licence start/renew?**

A The Practitioner's licence will be in immediate effect on the first day of attending Onboarding. Upon completing the 2-Day Onboarding, you will have access to our Wills Instructions portal, Practitioner's portal Twinkle and other resources. You may then start planning with your clients.

As Practitioners, you will be reminded to renew your licence as its nearing expiry. Thereafter, you will have a 6-month grace period from the expiration date to renew. Subsequently, your licence will be terminated if no renewal is made. To resume practice, you will need to complete the 3-Day Wills & Trusts course and 2-Day Onboarding again to obtain a new ESP code.

Q **Are there any forms of mentorship available to new Practitioners?**

A New Practitioners may choose to work with a Senior Practitioner to kickstart their estate planning business.