



AssureTrust

Structure Your Insurance & CPF Proceeds with **Certainty**

Protect your loved ones beyond a lump sum payout.



Life insurance and CPF savings form a strong financial foundation that supports us during our lifetime.

Upon our passing, they are typically disbursed as a lump sum through nominations.

Transform your Insurance & CPF Nominations into a professionally managed Trust.

Ensure your intentions are carried out with clarity, care, and control.

What Does It Offer?

Go beyond a lump sum. Create a plan that adapts to your family's real-life needs with flexible, structured payouts.



Periodic Payouts

Monthly, yearly, by age

01



Milestone Disbursements

Graduation, marriage, first home

02



Final Lump Sum

At a specific age or year

03



Corporate Trustee

With built-in safeguards

04



Contingency Planning

With appointed substitutes

05

Who Is It For?

Have greater flexibility and protection than the standard nomination, ensuring your loved ones receive the support in the way you intend.



Parents

Setting up structured support for children

01



Spouses

Protecting proceeds for dependents

02



Individuals

With multiple insurance policies and no Will

03



Anyone

Concerned about lump sum misuse or have minor beneficiaries

04



Philanthropists

Ensuring donations used as intended

05



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Flexible PAYOUT OPTIONS @ A GLANCE



Choose how your beneficiaries will receive their support



Regular Allowance

01

Monthly, quarterly, half-yearly, yearly



Milestone-Based

02

Graduation, marriage, home purchase, newborn



Premium Payments

03

Continued Insurance Coverage for medical or health plans



Final Lump Sum

04

Paid at a chosen Age or Year

What Can You Nominate to AssureTrust?



CPF Monies
via CPF Nomination



Insurance Policies
issued in Singapore (non-3rd party, non-premium-financed)



Up to **20 policies per trust***



Fee Structure (Upon Setup)

- Inclusive of 1 nominated Insurance Policy + CPF Nomination
- Enjoy **\$100 off Premium Lifetime Custody (PLC)** when you sign up as a new PLC client.
- *Additional Policy: +\$109 per policy (up to 20 policies)

Annual Administration Fees (Upon Activation)

- From 0.5% or less for assets up to \$1M
- Minimum: \$4,360/year for routine trust administration
- Tiered rates apply for movable assets
- Additional charges apply for routine work

Client Type **Setup Fee**
(1 Policy + CPF) **Initial Trust Assets** **Total Setup**

Existing Precepts Client / Bundling with a Precepts Will

Singaporean / PR	\$545 (incl. GST)	\$100	\$645
Foreigner	\$872 (incl. GST)	\$100	\$972

Standalone Assure Trust

Singaporean / PR	\$872 (incl. GST)	\$100	\$972
Foreigner	\$1,199 (incl. GST)	\$100	\$1,299

Ready to Protect Your Legacy? Speak with our **Estate Planners** or visit preceptsgroup.com/assuretrust to learn how AssureTrust ensures your wishes are fulfilled with clarity, care and control.