



# 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



#### Final Lump Sum

At a specific age or year



#### Contingency Planning

With appointed substitutes



#### Milestone Disbursements

Graduation, marriage, first home



#### Corporate Trustee

With built-in safeguards



#### Parents

Setting up structured support for children



#### Spouses

Protecting proceeds for dependents



#### Individuals

With multiple insurance policies and no Will



#### Anyone

Concerned about lump sum misuse or have minor beneficiaries



#### Philanthropists

Ensuring donations used as intended

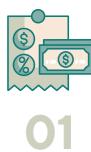


AssureTrust

# Flexible PAYOUT OPTIONS @ A GLANCE



Choose how your beneficiaries will receive their support



## Regular Allowance

Monthly, quarterly, half-yearly, yearly

01



## Milestone-Based

Graduation, marriage, home purchase, newborn

02



## Premium Payments

Continued Insurance Coverage for medical or health plans

03



## Final Lump Sum

Paid at a chosen Age or Year

04

## What Can You Nominate to AssureTrust?



### CPF Monies

via CPF Nomination



### Insurance Policies

issued in Singapore (non-3<sup>rd</sup> 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)

### 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

## 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

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