The Rise of Estate and Succession Planning

PRECEPTS ACADEMY

How can financial advisors tap on this rising trend of Estate & Succession Planning to **turbo charge their advisory practice**?

Precepts Academy is part of PreceptsGroup International, an established group of integrated estate planning services companies, providing Will Writing, MAS Licensed Trust services and Corporate Secretarial Services.

Choose your own journey!

Yes, I want to ...!

Be certified and Refer!

Associate Estate Planning Practitioner® Certification Programme

AEPP® Designation

AEPP® 2-Days

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

There are currently more than 8000 AEPP® Designees across Asia.

1. Acquire an understanding of the importance of Estate Planning
2. Discuss briefly about Estate Planning with clients
3. Refer clients to Estate Planning Practitioners*
4. Receive a nominal referral fee
5. Save Time

✓ Completes Precepts AEPP® Course + Designation

*Precepts Referral Program does not require any certification for an advisor to refer their clients

Become a Practititioner!

Estate Planning, Wills & Trusts for Financial Services Professionals

Wills & Trusts 3-Days Basic Course Certificate

Wills & Trusts 3-Days

1. Own my clients
2. Formulate my client's Estate distribution plan using Precepts Platform
3. Receive referrals from my clients as I am seen as the point person
4. Receive passive on-going commissions during trust duration
5. Be recognized as a successful practitioner
6. Able to commit a part of my time to acquire knowledge and experience

✓ Completes Precepts Wills & Trusts 3-Days Basic Course

✓ Completes 2-Days Onboarding

✓ Proceeds to acquire AEPP® Designation within 6-12 months

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®) CERTIFICATION PROGRAMME

Be certified and Refer!

AEPP® SWW EPPL Estate Planning Practitioners Limited

ABOUT THIS 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. This programme is specially designed to enhance your knowledge to address the growing needs of estate planning and wealth succession.

Our dynamic and experienced course facilitators have plenty of insights to share with you on how to use estate planning to energise and supercharge your advisory business.

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

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

This course will also award participants a total of 14 CPD hours.

Course Highlights

Day 1

- The Tools of Estate Planning: Wills, Trusts, LPA
- How Estate Planning creates opportunities for Sales
- Estate Planning with Fund Creation

Day 2

- Mass Affluent Estate Planning
- Inheritance and Concepts involved in wealth perpetuation

Scan here for more information

Prices is inclusive of GST	
Duration (9am-5pm)	2 Days
CPD 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.	12 Hours
Course Fee One-time Designation Fee	$1,308.00 $272.50
IBF-FTS Funding Net Fee (SG citizens age 40 and above)*	$1,080.50
IBF-FTS Funding Net Fee (below age 40)*	$1,220.50

*Terms and Conditions apply

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.

ONBOARDING AS A PRACTITIONER ON THE PRECEPTS PLATFORM

Become a Practititioner!
Scan here for more information

PRECEPTS
ACADEMY

PART 1
Estate Planning, Wills and Trusts for Financial Services Professionals 3-Days

Participants for this foundation course can choose to decide to proceed with onboarding (Part 2) subsequently.

ABOUT THIS PROGRAMME

This foundational course introduces concepts and legal instruments (Wills & Trusts) relating to wealth distribution and succession in detail. The participant will learn what are the key elements for the clients to consider to structure the estate plan.

Prices is inclusive of GST	
Duration (9 am – 5 pm)	3 Days
CPD 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.	18 Hours
Course Fee	$1,253.50
IBF-FTS Funding Net Fee (SG citizens age 40 and above)*	$753.50
IBF-FTS Funding Net Fee (below age 40)*	$908.50

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.

Course Highlights

Day 1 & 2 (Estate Planning & Wills)

- Intestate Succession Act
- Guardianship of Minor Children
- Methods to distribute
- Digital Assets Distribution
- Cross Border Assets & Other Nationalities

Day 3 (Trust)

- Elements of a Trust and Types of Trust
- Insurance as Funding for Trust
- LPA and its uses
- Business Succession Introduction

PART 2
Onboarding

ABOUT THIS PROGRAMME

This program equips you with the specific knowledge to plan for typical profiles of clients with detailed case studies and examples. Participants will learn how to use Precepts platforms and the products available.

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

Course Highlights

Day 1

- Wills Case Studies of 4 major 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

Precepts Practitioner Benefits

- Unlimited Refreshers for 3-Days and Onboarding Courses
- Regular workshops by experienced Practitioners and Staff
- Access to presentation kits, sample cases planning and training videos
- Joint appointments with clients
- AI driven Q&A platform

AEPP®
ADVANCED MODULES

Expand your estate planning and financial advisory expertise to Mass Affluent and HNWI clients with advanced knowledge from industry experts.

Specially crafted for financial advisors and practitioners, who are already equipped with foundational estate planning knowledge.

AEPP® Advanced: Buy Sell Arrangement for Business Owners

- Overview of business succession.
- Gain the skills to present it to business owners.
- Develop effective succession plans using legal and financial tools (e.g. buy-sell agreements, insurance, Wills, LPAs, and trusts).

AEPP® Advanced: Strategic Trust Planning For HNW Families 高净值家族信托战略规划 (Mandarin Course)

- A Mandarin-conducted course focused on the differences between Singapore and China's estate planning regulations, instruments, and trust structures.
- Gain the knowledge and skills to design and manage complex family trust structures for HNWI families.

AEPP® Advanced: Private Trust Company & Family Offices for HNWIs Wealth Succession

- Learn the essentials of PTCs and Family Offices.
- Compare trust instruments for wealth succession.
- Understand how to advise HNWIs on suitable structures and how they work together.

AEPP® Advanced: Engaging HNWI Clients & Understanding Banks HNWI Offerings

- Understand the banking services used by HNWI clients.
- Enhance advisors' soft skills and confidence to engage them effectively.

Available for exclusive class for teams (minimum 15 pax) with corporate discounts and group discounts

Contact Precepts Academy:

+65 8070 8300 academy@preceptsgroup.com

Scan here for more information