Organised By:

PRECEPTS ACADEMY

ESTATE PLANNING, WILLS AND TRUSTS FOR FINANCIAL SERVICES PROFESSIONALS

This course is structured for participants to start building their knowledge in Estate Planning relating to **Wills and Trusts**. This is a foundational course for professionals within the wealth management industry and is also a compulsory course to complete to onboard as a Precepts Estate and Succession Practitioner.

In Singapore, estate planning is often done as an after-thought. With a greying population and growing affluence, there is an urgent need to reach out to the masses to act on planning their wealth distribution early.

Through this 3-day course, participants will learn the essential components of a Will and the various ways of distribution of assets that a person can consider. The course will cover a comprehensive introduction to Trust and what are the differences between Will and Trust. The trainer will explain how Trust structures benefit regular families as well as Mass affluent and High Net Worth Individuals.

Our trainers are senior and qualified practitioners who are experienced and passionate in Estate Planning. They would be sharing their experience and practical skills to uncover gaps to provide a more thoughtful estate planning process.

OUR TRAINERS

John Sim

CFP®, AEPP®,
MSc (Computer Science and Information Systems)

John Sim is a passionate believer that education is key to achieving success in life. He acts out this belief through Eduvantage Pte Ltd, a social enterprise he founded in 2011 that conducts complimentary seminars in the areas of wealth optimisation, healthy living and relationship building.

Since 2013, he has followed his passion for financial planning and embarked in a new direction by starting his financial advisory business. Through Eduvantage and his FA business, he aims to help improve the lives of people, with a focus on families with members who have special needs.

Darren Tan

ChFC®/S, TEP, AEPP®

Darren is a passionate believer to lifelong learning and 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.

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.

Ang Kok Chin

CFP®, AEPP®

With over a decade in the industry, Kok Chin is widely regarded as one of the top estate planners in Singapore. His career started out advising clients on holistic financial planning but as more and more needed intimate advice on wealth transference to their children, Kok Chin honed his skills in estate and legacy planning.

Naturally, Kok Chin's clients are an impressive list of the who's who in Singapore and in the region. His work has seen him submerged in the estate planning for individuals with a net worth more than US$100 million.

Ng Li Ning (Enzo)

AEPP®, STEP Affiliate

Before he was 20, Enzo and his family went through an estate issue when his mother died. The experience greatly disturbed him, and shockingly revealed the financial and estate illiteracy of many Singaporeans. Enzo has been the top Trust advisor with Precepts for the last three years. Enzo's partnerships with External Asset Managers, Private Bankers, Financial Advisors, and Legal Firms have enabled him to offer the full suite of consultation to many individuals, families, and business owners.

COURSE COVERAGE:

Day 1	Understanding Wills & Estate Administration

- **Estate Planning: Challenges & Opportunities**
- **Consequences of Passing Away Without a Will**
  - Overview of the Intestate Succession Act
  - Court process and Letter of Administration
- **Requirements of a Valid Will**
- **Common Pitfalls of Simple or Incomplete Wills**
- **Key Considerations in Will Planning**
- **Roles of Executors, Trustees & Guardians**
- **Estate Administration Overview**
  - Grant of Probate vs Letter of Administration
- **Guardianship Planning for Minor Children**

Day 2	Asset Distribution & Estate Considerations

- **Strategies for Asset Distribution**
  - Insurance Nominations
  - Central Provident Fund (CPF) Nominations
  - Bank Accounts, Investments & Business Interests
- **Singapore Real Estate Distribution Rules**
- **Managing Cross-Border Assets**
- **Testamentary Trusts**
- **Risk Management in Will Planning**
- **Case Studies & Practical Applications**

Day 3	Trust Structures & Legacy Planning

- **Introduction to Trusts**
  - Wills vs Trusts
  - Types and Purposes of Trusts
- **Trust Creation & Funding Strategies**
- **Planning with Lasting Power of Attorney (LPA)**
- **Building a Comprehensive Estate Plan**
- **Special Planning Considerations**
  - Muslim Distribution Laws
  - Planning for Persons with Special Needs
- **Trust Structures for Specific Assets/Purposes**
  - Property Trust, Charitable Trust, Buy-Sell Trust and Private Trust Company

CPD Hours:	18 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 to 3	9 am – 5 pm

Register here

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

COURSE FEE

$1,253.50
(Inclusive of GST)

IBF-FTS Approved Programme
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 below age 40 & Permanent Residents 30% IBF Funding
Course Fee: $1,150	Course Fee: $1,150
9% GST: $103.50	9% GST: $103.50
70% Funding: $500 (cap)	30% Funding: $345
Net Fee Payable: **$753.50**	Net Fee Payable: **$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.