



AssureTrust

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

Protect your loved ones beyond a lump sum payout.



Life insurance and CPF savings often represent some of the largest financial resources we leave behind for our loved ones.

Upon death, these proceeds are commonly paid out through insurance and CPF nominations. While this provides access to funds, it may also mean that your beneficiaries receive a lump sum without guidance, structure, or safeguards.

AssureTrust allows you to direct your insurance and CPF nomination proceeds into a professionally managed Trust.

Instead of a one-time payout, your loved ones can receive support according to your intended instructions, with greater clarity, continuity, 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 are used as intended

05



Flexible PAYOUT OPTIONS @ A GLANCE

Choose how your beneficiaries will receive their support

 01	Regular Allowance Monthly, quarterly, half-yearly, yearly	 02	Milestone-Based Graduation, marriage, home purchase, newborn	 03	Premium Payments Continued Insurance Coverage for medical or health plans	 04	Final Lump Sum Paid at a chosen Age or Year
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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)

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 & Succession Practitioners** or visit preceptsgroup.com/assuretrust to learn how AssureTrust ensures your wishes are fulfilled with clarity, care and control.