Organised By:

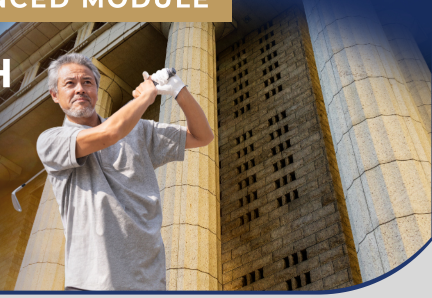
AEPP® | EPPL Estate Planning Practitioners Limited

PRECEPTS ACADEMY

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®)

ADVANCED MODULE

ENGAGING HIGH NET WORTH INDIVIDUAL CLIENTS & UNDERSTANDING BANKS HNWI OFFERINGS



The High Net Worth Individual (HNWI) market continues to grow rapidly in Singapore. Financial advisors seeking to serve the HNWI market should ensure they are well equipped to handle such sophisticated clients effectively.

Traditionally serviced mainly by the banks, financial advisors need to upscale their knowledge and skills to meet the expectations of HNWI clients. Understanding the type of banking services used by the HNWI clients is crucial to effectively cater to their needs.

This course is designed for advisors and estate planning practitioners to elevate soft skills techniques and confidence in engaging HNWI clients.

Trainer:

David Koay

David Koay has over 35 years of extensive banking & corporate finance experience. He has held senior positions in both Private Banking and Corporate Banking roles in various international and regional banks.

David's unique experiences come from serving as Group Treasurer for a client who is listed in Forbes Asia's list of UHNWI. In this role, he was instrumental in transforming start-up companies to significant market players.

Currently, David serves as the Group CEO of British & Malayan Holdings Limited, Singapore's oldest independent listed Trust services group.

COURSE HIGHLIGHTS

HNWI Engagement

- Needs and Priorities of HNWI clients
- Preparation Steps before Meeting prospective HNWI clients
- Do's and Don'ts at a Meeting with HNWI clients (Role Play Exercises)
- Working into being relevant to a HNWI client

Wealth Management Solutions vs Private Banking Solutions

- Corporate Banking Solutions for HNWI and Business Owners
- Global Bank vs Regional Bank Set Up
- Types of Relationship Managers in Wealth Management
- A typical Private Bank set up for HNWI clients
- How Banks attend to a HNWI and/or Business Owners Needs
- Types of Trust Structures for Business Owners used by Banks

CPD Hours:	6 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	9 am – 5 pm

Register here

https://www.preceptsgroup.com/education/

COURSE FEE

$654
(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: $600	Course Fee: $600
9% GST: $54	9% GST: $54
70% Funding: $420	30% Funding: $180
Net Fee Payable: **$234**	Net Fee Payable: **$474**

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.