AEPP® | EPPL Estate Planning Practitioners Limited

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®)

ADVANCED MODULE

STRATEGIC TRUST PLANNING FOR HIGH NET WORTH FAMILIES

The number of Asia’s High Net Worth Individuals (HNWI) continues to grow strongly. With the People’s Republic of China (PRC)’s rapid growth and ascent, the numbers in PRC grew even more substantially. In recent years, more and more HNWI Chinese families are starting to learn modern Wealth Succession Planning techniques and structures.

At the same time, Business Owners also realised the importance of planning for the succession of their businesses to the next generation. Due to the general unfamiliarity with the concept of family trusts in the Asian market, they often seek help and guidance from experts in wealth management and inheritance practices.

This is an advanced training course designed for financial services practitioners, insurance professionals, bankers, estate and succession practitioners, and legal advisors who work with HNW families.

This comprehensive course provides participants with the knowledge and skills needed to plan, implement, and manage complex family trust structures. These trust structures are specifically tailored to the unique needs and goals of HNWI and their families.

The course will be conducted in Mandarin, aligning with its objective to help participants understand the distinctions between Singapore and China's estate planning regulations, instruments and Trust structures.

Participants should be proficient in Mandarin, as this will enable them to effectively engage with Mandarin-speaking clients and prospects. Through the course, participants will gain familiarity with estate planning and trust-related technical terms in Mandarin, enhancing their ability to navigate these complex topics.

Please note that all course materials will be provided in Mandarin, with no English translations available.

Trainer:

Cindy Qi

Cindy Qi is an expert in identifying cross-border client’s expectation and needs leading her to provide unique financial solutions for such clients. With over a decade of experience in the financial sector, she has been instrumental in fund project financing, mergers and acquisitions, and has actively participated in IPO listing processes.

Cindy is a STEP Singapore branch member and an AEPP® Designee. She is certified as Wealth Management Institute (WMI)’s Family Office Advisor for Greater China, and she is also an Associate member of The Global-Asia Family Office Circle (GFO circle).

Since 2018, Cindy has delved into wealth management, family trust & family office structure, estate planning, and fund management services in Singapore. She helps Ultra HNWI and HNWI clients to meet their family and business succession goals.

Cindy Qi is currently LuxeGreen Group’s Chief Wealth Succession Specialist. She graduated with Bachelor of Law in China, Master of Asset & Wealth Management in Nanyang Technological University of Singapore and Master of Business Management in Curtin Australia.

COURSE COVERAGE:

- **Family Trust Introduction**
  - The purposes and applications of Family Trusts
  - How to recommend Trust structures to Clients

- **Difference between Offshore and Onshore Trust**
  - Definition of Trusts under China's civil law system.
  - Main types of Trusts currently in China.
  - How to introduce Offshore (Singapore) Trusts.
  - Advantages of Singapore Trusts & their applications
  - Types of Singapore Trusts
  - Introduction to Private Trust Company

- **The Importance of Trust Planning**
  - Client Fact Finding Form
  - Comparison between Wills and Trusts

- **Comparison of Singapore and China's Laws and Tax**
  - China Laws and Taxes
  - Marriage law, Inheritance law, Company law, Contract law, Tax regulations

- **Case Discussions**
  - Planning considerations
  - Analysis of assets
  - Formulating objectives
  - Preparing Proposals

CPD Hours:	7 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 – 6 pm

Register here

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

COURSE FEE

$872
(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: $800	Course Fee: $800
9% GST: $72	9% GST: $72
70% Funding: $500	30% Funding: $240
Net Fee Payable: **$372**	Net Fee Payable: **$632**

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.

Organised By:

PRECEPTS ACADEMY

AEPP®

EPPL Estate Planning Practitioners Limited

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ADVANCED MODULE

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高净值家族信托战略规划

亚洲的高净值人士数量日益增长。尤其是在中国的迅速发展带动下，这一群体的增速更为显著。近年来，越来越多的高净值家族开始学习和了解新时代的智慧财富传承方式。

同时，企业家们也逐渐意识到，将家族企业有效且成功的传承给下一代的重要性。由于亚洲市场对家族信托的概念普遍还不够熟悉，他们在财富管理与财富传承的实践中，往往需要寻求这个领域专家的帮助和指导。

《高净值家族信托战略规划》是一门专为与高净值家庭服务和合作的金融从业者、保险专业人士、财富传承规划师和法律顾问设计的高级培训课程。

该综合课程为参与者提供设计、实施和管理复杂家族信托架构所需的知识和技能。这些信托架构专门针对高净值个人及其家族的独特需求和目标量身定制。

讲师

齐心祎 Cindy Qi

齐心祎 Cindy 是解读跨境客户期望和需求并提供合规金融解决方案的专家。她拥有超过10年以上的金融从业经验，具有丰富的家族财富管理经验。Cindy 也曾参与多个并购基金的募资管理和退出及海外上市IPO项目。

Cindy 是国际信托及资产规划学会的会员STEP Affiliate Member。她并获得AEPP®家族财富传承师资质。她拥有WMI大中华区家族办公室顾问证书，也是全球-亚洲家族办公室联盟 （GFO circle）的会员。她成功打造联合家族办公室管理平台，为超高净值/高净值客户提供财富策略解决方案，以实现其家族和企业的扩展及传承目标。她也是新加坡家族信托，家族办公室架构、财富解决方案、基金管理服务方面的专家。

Cindy 现任为新加坡绿豐集团的首席财富规划师。她毕业为中国西北政法大学法学学士及新加坡南洋理工大学资产与财富管理硕士和澳大利亚科廷大学商业管理硕士。

课程简介

- **家族信托简介**
  - 家族信托的意义和适用
  - 如何推荐信托给客户
- **离岸信托与在岸信托的区别**
  - 大陆法系下的信托定义
  - 中国目前主要信托的类型
  - 如何介绍离岸信托
- **新加坡信托的优势及模式**
  - 新加坡的优势
  - 新加坡信托的分类
  - 私人家族信托简介和架构
- **信托规划的重要性及适用**
  - 客户调查问讯表
  - 遗嘱和信托对比
- **新中法税对比简析**
  - 中新法律适用性
  - 婚姻法，继承法，公司法，合同法，税法
- **案例分析**
  - 规划前的考量
  - 资产分析
  - 目标定锁
  - 建议准备

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