AEPP® | EPPL

Organised By: PRECEPTS ACADEMY

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®)

ADVANCED MODULE

The Art Of Engaging High Net Worth Clients

Singapore's growing HNWI population creates new opportunities for advisers with the expertise to deliver sophisticated and tailored wealth planning solutions.

Join us to gain practical insights, enhance your advisory capabilities, and equip yourself with the confidence to better serve HNWIs in a rapidly evolving wealth landscape.

TRAINER

David Koay

- Group CEO, British & Malayan Holdings Ltd
- Director of PreceptsGroup International Pte Ltd
- Over 35 years' experience in banking and corporate finance
- Previously held senior positions in private and corporate banking across global banks
- Instrumental in turning start-up companies into significant market players
- Former Group Treasurer for a Forbes Asia-listed UHNW client

COURSE HIGHLIGHTS

Understanding HNWIs and Business Owners

- Their priorities and motivations

Banking Structures and Wealth Management

- Global, regional, private, and corporate structures
- Types of relationship managers
- Typical setup of a private bank
- Cross-bank case studies

Using Legacy Planning to Engage HNWIs

- Wealth transfer through wills and trusts
- Planning strategies for business owners:
  - Business Insurance Trusts
  - Pre-IPO Trusts

Preparation for HNWI Appointments

- Account planning template

Self-Awareness and Personal Effectiveness to clients

- Utilising the Johari Window concept
- HNWI personality characteristics

Scenario-Based Activities

- Simulation-based practice
- Common mistakes and misconceptions

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 | **9.30 AM - 5.30 PM**

REGISTER HERE

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

COURSE FEE

$654

Inclusive of GST

- IBF-FTS Approved Programme
- UTAP Funding 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.