

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®)

ADVANCED MODULE

Strategic Trust Planning for HNW Families



This advanced course in Mandarin is designed for financial, insurance, banking, family office professionals who wish to advise High-Net-Worth (HNW) families with a stake in China assets.



It equips participants with the knowledge to design and manage sophisticated family trust and wealth succession structures, with a focus on the estate planning and trust frameworks of Singapore.



Course delivery and materials are provided in Mandarin only

Who Should Attend:

Financial Planner, Insurance Agent, Bancassurance Specialist, Agency Manager, Agency Director, Relationship Manager - Retail Banking, Personal Banking Manager, Family Office advisor, Relationship Manager - Private Banking



TRAINER

Cindy Qi

- Chief Wealth Planner, LuxeGreen Group (Singapore)
- Family Office Advisor (Greater China) of Wealth Management Institute (WMI)
- Associate member of The Global-Asia Family Office Circle (GFO Circle)
- Specializes in wealth management, Family Offices and Trusts, and succession planning for HNWIs and UHNWIs clients

COURSE HIGHLIGHTS

Family Trust Introduction

- The purposes and applications of family trusts
- How to recommend trusts to clients

Difference between Offshore and Onshore Trust

- Definition of trusts under civil law systems
- Main types of trusts currently in China
- How to introduce offshore trusts

Advantages and Structures of Singapore Trusts

- Advantages of Singapore
- Types of Singapore trusts
- Introduction to private family trusts and their structures

The Importance and Application of Trust Planning

- Client fact finding form
- Comparison between Wills and Trusts

Brief Comparative Analysis of Singapore and China's Laws and Taxes

- Applicability of Singapore and China laws
- Marriage law, inheritance law, company law, contract law, tax law

Case Study

- Pre-planning considerations
- Analysis of assets
- Setting 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/education/>

COURSE FEE

\$872

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	SG Citizens below age 40 & Permanent Residents
70% IBF Funding	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.

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高净值家族 信托战略规划



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随着亚洲高净值人士持续增长，尤其是中国市场的快速发展，财富传承与家族企业接班规划需求日益增加。《高净值家族信托战略规划》是一门专为金融、保险、财富管理及法律专业人士打造的高级课程，帮助学员系统掌握家族信托的设计、实施与管理，提升专业规划能力，满足高净值家族的财富传承需求。

适合人群:

理财规划师，保险代理人，银保理财专员，团队经理与业务总监，零售银行与贵宾账户理财经理，家族办公室顾问，私人银行客户经理等。

讲师

齐心祎 Cindy Qi

- 新加坡绿丰集团的首席财富规划师
- WMI大中华区家族办公室顾问
- 全球-亚洲家族办公室联盟（GFO Circle）的会员
- 拥有逾10年金融行业经验，专注于跨境财富管理、家族财富传承、家族信托及家族办公室规划，为超高净值及高净值客户提供财富与企业传承解决方案



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

- 客户调查问卷表
- 遗嘱和信托对比

新中法税对比简析

- 新中法律适用性
- 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
- 目标锁定
- 建议准备



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