

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP®)

ADVANCED MODULE

Unlocking Advisory Potential in Family Offices



The number of Family Offices in Singapore has grown exponentially. This course equips legacy planners and financial services professionals with the knowledge to help High-Net-Worth individuals (HNWIs) preserve and transfer wealth through effective succession planning.



It covers the fundamentals of Family Offices (FOs) and Private Trust Companies (PTCs), their roles in managing family businesses and assets, key differences between trust structures, and how to recommend the most suitable solutions for clients' wealth succession needs.

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



TRAINER

Ethan Lim

- CEO of a Single-Family Office
- Family Office Advisor to Paragon Assets Management
- 20 years of experience in corporate & private banking

COURSE HIGHLIGHTS

Why HNW Clients Set Up Family Offices

- Understand Singapore's family office landscape.
- Confidently engage affluent clients on their needs and structures.
- Position yourself as a trusted long-term advisor.

How a Private Trust Company (PTC) Strengthens the Family Office

- Understand the difference between a traditional trust and PTC.
- Learn why wealthy families prefer PTCs.
- Discover how a Family Office integrates with a PTC to protect assets and succession.

Your Role in the Family Office Ecosystem

- Lead strategic family discussions with confidence.
- Unlock opportunities beyond traditional products.
- Become the family's trusted advisor for long-term legacy planning.

First Appointment Framework & Case Studies

- Use proven checklists and roadmaps to impress clients.
- Uncover needs that lead to Family Office and PTC opportunities.
- Leave clients feeling, "We want you to guide our family."

To note:

This is an AEPP® Advanced Module. Participants should have a basic understanding of Estate Planning, Wills, and Trusts. Completion of at least one of the following modules is strongly recommended:

- AEPP®
- Precepts Estate Planning, Wills and Trust 3 Days Course
- Similar courses



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

9AM - 5PM



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.