Program Title: Holistic Estate & Legacy Planning (HELP) Professional

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Program Overview:

The Holistic Estate & Legacy Planning (HELP) Professional program is a 2-day application-focused course designed to equip financial planners and bancassurance specialists in Singapore with advanced skills in practicing holistic estate and legacy planning. Participants will gain practical knowledge and hands-on strategies to integrate estate and legacy considerations into holistic financial planning, ensuring clients' financial objectives, business continuity, and family wealth succession are met in a professional and client-centric manner.

What To Expect In this Course

- Case study–based learning
- Group simulations, reverse learning, role-play and discussion
- Document analysis practice (constructing and interpreting personal financial statements, policy wordings, Wills, Trusts, etc)
- Application based learning to design holistic estate and legacy plans with insurance & investment tools

Learning Objectives:

By the end of the course, participants will be able to:

- Apply the three tenets of holistic estate and legacy planning into business ownership and financial planning processes
- Demonstrate customer relationship management strategies in estate and legacy contexts and effectively build credibility and gain trust for in-depth discussion
- Construct personal financial plans with an emphasis on integrating estate and legacy needs into the planning process
- Apply holistic estate and legacy planning approaches, including the effective use of estate planning document such as wills, trusts, and business succession models
- Evaluate insurance and investment product criteria relevant for legacy solutions to ensure certainty of addressing client's objectives
- Conduct financial document analysis on financial statements and documents
- Apply investment planning methodologies in estate and legacy planning portfolios
- Implement issue resolution approaches to resolve family conflict, liquidity crunch, tax disputes and misunderstanding between client and planner

Total Training Hours:

14.0 hours (including a 1-hour online Multiple-Choice Question (MCQ) Assessment).

Upon completion of this program, you will be awarded a **Certificate of Completion** and **14 Supplementary (Non-Core) CPD Hours**.

Who Should Attend:

This course is for licensed representatives working as Financial Planners and Bancassurance Specialists involved in financial advisory work.

Course Fee:

$2,000 before GST

Funding:

This course has been accredited under the Skills Framework for Financial Services and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met. Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.

The IBF-STS is available to eligible entities and individuals based on the prevalent funding eligibility, quantum and caps. IBF-STS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S3,000 per candidate per course subject to all eligibility criteria being met.

Find out more on www.ibf.org.sg.

About IBF Certification:

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

- Personal Finance Advisory (proficiency level 4)

Participants are encouraged to access the IBF MySkills Portfolio (https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process on https://www.ibf.org.sg/home/for-individuals/ibf-certification/why-be-ibf-certified.

Program Schedule and Registration:

For program schedules and registration details, please contact us at **enquiries@fp-edu.com**.