# AB MAXIMUS

Capital Markets Training

**A.B. Maximus & Co. Pte Ltd**
160 Robinson Road
#27-06 SBF Centre
Singapore 068914

T: 6327 5436
F: 6214 3596
E: Trainingadmin@abmaximus.com

# Estate Planning - Common Legal Rules of Succession: A Practical Approach

**6 CPD HOURS**

**Programme Code:** P180411IWL
**Skills Category:** E. Investment & Financial Management
**Skills Competency:** Wealth Planning Administration
**Proficiency Level:** 3

## Overview & Course Learning Outcome

This course provides you with a comprehensive and practical range of estate planning skills to manage some of its complexities.

Upon completion of this intensive three day course, you will be able to:

- Introduce estate planning to your client through in-depth understanding and trust building
- Understand various aspects of the laws in estate planning
- Understand the importance of contracts and nominations
- Explain the legal process in wills
- Explain the valid creation of a trust.
- Communicate clearly the various forms of trusts to your clients

## Course Outline

What you will learn in this course:

- Introduction to Estate Planning
  - How Estate Planning will benefit your practice and businesses
  - Building Trust with your Client
- Common Legal Rules of Succession (Introduction)
- Aspects of Laws
  - Civil Law
  - Common Law
  - Law of Equity
- Intestacy
  - Concept of Domicile
  - Wealth Distribution Process
- Contract & Nominations
  - CPF Nomindations
  - Insurance Contract
  - Key-Man Insurance
  - Buy-Sell/ Shareholder Agreements

### IBF-FTS Funding

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. For more information please visit IBF Website.

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period.

# AB MAXIMUS
Capital Markets Training

# Estate Planning - Common Legal Rules of Succession: A Practical Approach

## Course Outline cont.

- Wills
  - The legal processes involved in probate and administration
  - Dealing with the deceased's joint properties, accounts with financial institutions, the CDP and CPF.
- Trust
- Regulation of Singapore Trusts
- Will Trust and Declaration of Trusts
  - How a trust is created in a Will
  - Benefits of using trusts in a Will
  - Making declarations of Trusts

## Course Methodology

- Class-based presentation
- Case Studies discussion
- Assessment to reinforce learning

## Who Should Attend

- Financial Advisors
- Financial Planners
- Insurance agents
- Trust administrators
- Anyone with an interest in estate planning

## Speaker's Profile

**Lee Wei Meng, LLB, CLU, ChFC** is currently serving as the legal counsel to Falco Heritage Pte Ltd, an estate planning firm providing wills and trust services. He is also a Director, Financial Advisory Services with Financial Alliance Pte Ltd, since 2007.

He has more than 30 years of experience in the financial industry, advising both practitioners and families on estate and succession planning. He received his Bachelor of Laws (LLB) from UK and holds the Chartered Life Underwriter and Chartered Financial Consultant accreditation and a Member of The Society of Will Writers (UK)

# Register your interest today!

For in-house training request, please contact Alson at alson@abmaximus.com.
Competitive corporate discounts available for bulk registration.

**Visit** https://www.abmaximus.com/supplementary-cpd-courses **to find out more about the other courses available.**

**A.B. Maximus & Co. Pte Ltd** 160 Robinson Road, #27-06 SBF Centre, Singapore 068914
T: 6327 5436 F: 6214 3596 | E: Trainingadmin@abmaximus.com