



● 7 CPD Hours | Introductory
Legacy Planning:
More Than Just
Paperwork

[Register Here](#)

Mode: Face-to-Face Training

Date: 29 November 2024

Time: 9.00 a.m. to 5.00 p.m.

Programme Highlights

Legacy planning is a necessity in Singapore due to demographic, societal, and economic trends. The urgency has increased as we move beyond the COVID-19 pandemic and face an uncertain future. Technically, legacy planning must be professionally managed to be effective; otherwise, it can create problems for the family, undermining the good intentions behind the planning.

This one-day course aims to provide participants with a broad overview of the why, what, and how of legacy planning to ensure the desired outcomes.

For Whom

- Insurance Professionals: Financial advisory professionals looking to upskill in the legacy planning area.
- Newcomers: Individuals seeking to enter the insurance industry or expand their insurance-related education.

Key Learning Objectives

At the end of the programme, participants should be able to:

- Know the definition of legacy planning
- Understand the financial planning aspects of legacy planning
- Identify and understand the various tools for legacy planning
- Analyse through case studies from the financial planning perspective

Programme Outline

Definition of legacy planning

- The difference between legacy planning and estate planning
- The reasons for legacy planning

The financial planning aspects of legacy planning

- Solvency and liquidity analysis of the client's personal balance sheet upon demise
- Identifying effective financial tools for legacy planning
- Anticipating potential risks that legacy plan can give rise to
- Case Studies

How To Use Tools For Legacy Planning

- Wills
- Statutory Nominations
- Trust
- Lasting Power of Attorney (LPA) and Advance Care Planning (ACP)
- Government Platforms
- Case Studies

Programme Leader

Allen Lim is the founder of Advisers' Harbour, a brand created under his company, Retirement and Inheritance Planning Consultancy Pte Ltd, to offer professional mentorship and joint fieldwork services to financial advisers in Singapore and Thailand.

He holds a unique position in the financial services sector, known for his expertise in technical knowledge, scenario-based analysis, and trend-focused case studies designed to support his stakeholders. Allen is the first financial adviser to be elected as president of the Asia Estate Planning Association (AEPA), and he is a prominent advocate for the Chartered Financial Consultant (ChFC®/S) program in Singapore. In 2021, he was awarded the prestigious IBF Fellow title, recognizing his leadership, thought leadership, and commitment to advancing the industry.

Programme Fee

Full Course Fee: S\$545.00 (incl. of 9% GST)

Note: Details on funding to be advised

SINGAPORE COLLEGE OF INSURANCE

CPE Registration No: 199408491M

Period Of CPE Registration: 26-09-2023 to 25-09-2027

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