



● 3 CPD Hours

Estate and Financial Planning for Families who have Persons with Special Needs

[Register Here](#)

Mode: Face-to-Face Training

Date: 5 December 2024

Time: 9.00 a.m. to 12.00 p.m.

Programme Highlights

Persons with special needs (PSNs) need more help in their daily lives and their numbers are not small. There are 27,000 students with mild special education needs in mainstream schools and 7,000 students who typically have mental disability in SPED schools¹.

A critical need is for well-rounded planning and support to ensure the security and well-being of PSNs and their families. This programme looks at what 'special needs' means and uncovers strategies to ensure sufficient funds and support are available for PSNs after the caregiver is no longer present. We will also look at the professional deputyship which is a critical backup plan for families who may not have caregivers from their own family to care for the PSN.

Participants will leave the programme with an enriched understanding and a structured approach to planning for PSNs, enabling them to make significant contributions to the lives of PSNs and their families by fostering financial stability and peace of mind.

For Whom

- Life Insurance Advisors & Agency Leaders
- Financial Planners, Financial Advisor Representatives, and Bank Relationship Managers.
- Individuals seeking to deepen their understanding of PSNs and explore ways to aid them and their families more effectively will greatly benefit from this course.

Key Learning Objectives

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

- The implications of the increasing prevalence of PSNs in society.
- Understand the critical need for robust capital and liquidity planning for families with PSNs.
- Discern the distinctive features and benefits of the SNTC and private trusts, and how they can be effectively integrated for maximal impact.
- Learn about the Professional Deputies and Donees (PDD) scheme which aims to serve individuals, who may not have family members or close friends to rely on; to be their proxy decision makers.

¹ www.spd.org.sg/about-us/disability-facts-figures/

Programme Outline

- Special Needs Education in Singapore: Overview and current state of affairs.
- Understanding SNTC and how they help PSNs.
- How SNTC Trusts work.
- Merging private and SNTC trusts for enhanced benefits.
- Examining methods and strategies for robust financial planning for PSNs.
- Learn about the Professional Deputies and Donees (PDD) scheme.
- Actual case studies on planning for PSNs.

Programme Leaders

Ms Wheeki Goh is Head of Community Engagement at the Special Needs Trust Company (SNTC). SNTC is the only non-profit trust company set up to provide affordable trust services for persons with disabilities. More on SNTC can be found [here](#).

Ms Loh Seow Ling is Managing Director of EmRe Legal LLC. She is especially interested in formulating sustainable estate planning solutions for singles, families with special needs members and elderly individuals. More on Seow Ling can be found [here](#).

Mr Keon Chee is Executive Director of Riverside Trustees. He has planned for families with PSNs and has structured plans with both SNTC and private trusts. More on Keon's background can be found [here](#).

Programme Fee

Full Course Fee: S\$163.50 (incl. of 9% GST)

SINGAPORE COLLEGE OF INSURANCE

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

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