



**Riverside**  
Training

Introducing the

# CERTIFIED LEGACY PLANNING



ESTATE PLANNING FOR

# OUR MODERN TIMES

- PLAIN ENGLISH
- RELEVANT FOR FINANCIAL PLANNERS
- TAUGHT BY TOP SPECIALISTS

Recognised by:  
ASIA ESTATE PLANNING ASSOCIATION (AEPA)

RIVERSIDETRAINING.SG



## OUR TRAININGS ARE:

### **Broad-based**

To meet diverse needs of modern families.

### **Relevant to Financial Planning**

We believe every Estate Plan has to be well funded.

### **Plain English**

We excel at simplifying complex concepts.

### **Taught by Specialist Trainers**

Who are highly experienced.

Visit [www.riversidetraining.sg](http://www.riversidetraining.sg) to learn more and to register.

**“Thank you for the CLPA! After 20+ years of MDRT,  
I finally got my TOT!”**

**From a producer from an insurer who is a 2021 Multiple TOT Producer.**







# YOU WILL LEARN ABOUT:

## FAMILY SITUATIONS

### MEP1

Wills, Basic Testamentary Trusts, LPA Form 1

### MEP2

Planning for Foreigners, LPA Form 2, Charities

### MEP3

Divorce, Special Needs, Muslims

## INSURANCE APPLICATIONS

### PIP1

Distribution Options, Planning Situations (blended family, divorce, singles & others)

### PIP2

Insurance for HNW, Universal life, VUL, PPLI

## ELECTIVES

### ELE1

Residential Property Ownership, Inheritance Rules, Divorce, Property Trusts, Stamp Duties

### ELE2

Estate Admin for Singaporeans & Foreigners

## BUSINESS SITUATIONS

### BIZ1

Running & Protecting the Business (Business Insurance)

### BIZ2

Protecting the Owners (Buy-Sell Agreements)

## TRUST APPLICATIONS

### PTP1

Trust structures that most Singaporeans use

### PTP2

Active Trusts, Private Trust Companies, Family Business Constitution

# PROGRESSION

Attain CLPA in 4 modules. Then attend other modules for enhanced learning.

## LEVELS:

CLPA

CLPA Advanced

Electives

## MODULES:

MEP1, PTP1, BIZ1, PIP1

MEP2, PTP2, BIZ2, PIP2

MEP3, ELE1, ELE2

### Note:

You should have attended CLPA or similar courses before attending Advanced modules & Electives.

## WHO SHOULD ENROL?

Our courses are suitable for:

- Financial Planners
- Bankers
- Wealth Managers
- Accountants
- Lawyers
- Trust Officers
- Investment Advisors
- Families & SMEs

### Note:

IBF FTS subsidies are generally available to licensed representatives only.





**KEON CHEE**

LLB MBA

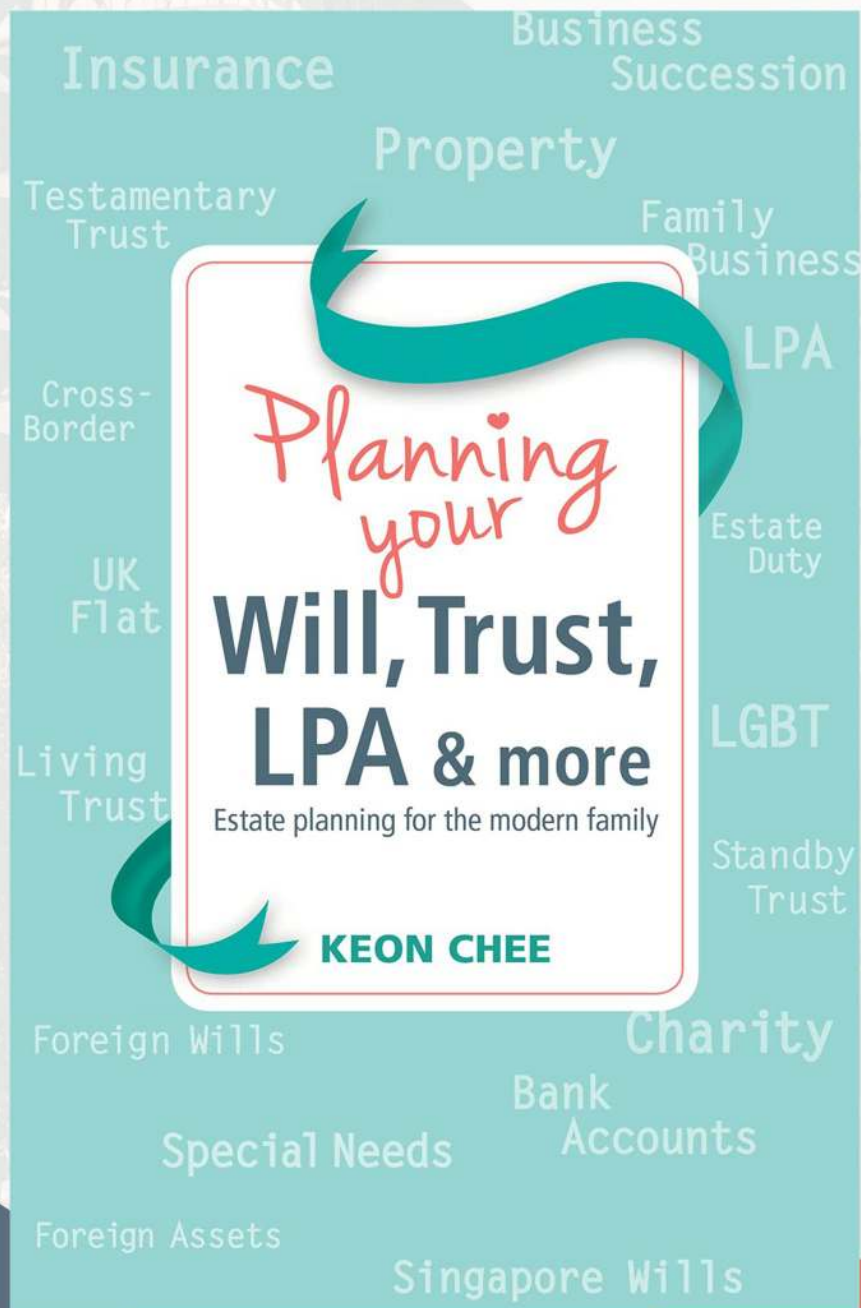
Director and Founder  
Riverside Training

*“We simplify estate planning so that you can serve your clients better.”*

## HOW WE DO IT

We collaborate with financial planning-friendly specialists.

Our latest book has 30 contributors from over 12 countries.



# MODERN ESTATE PLANNING

## MEP1 (1 DAY)

MEP1 counts towards CLPA Certification

This course covers:

1. **WILLS**  
Specify who receives your assets.
2. **BASIC TESTAMENTARY TRUSTS**  
Stagger gifts over time to loved ones.
3. **LPA FORM 1**  
Specify how you be looked if you lose mental capacity.

# MODERN ESTATE PLANNING

## MEP2 (1 DAY)

MEP2 counts towards CLPA Advanced Certification

This course covers:

1. **INHERITANCE & MARRIAGE SYSTEMS**  
Comparing Singapore with Indonesia, Thailand and China.
2. **LPA FORM 2**  
Customisable for diverse family and business needs.
3. **CHARITABLE GIVING**  
Give back during and after one's lifetime.



# MODERN ESTATE PLANNING

## MEP3 (1 DAY)

MEP3 is an Elective

This course covers:

1. **DIVORCE**  
How assets are protected for spouse and children.
2. **SPECIAL NEEDS**  
Plan a financial future that gives caregivers a peace of mind.
3. **ISLAMIC INHERITANCE**  
Methods for Muslims to plan their estates for the family.

# RUNNING & PROTECTING A BUSINESS

## BIZ1 (1 DAY)

(with Keyman Insurance)

BIZ1 counts towards CLPA Certification

This course covers:

1. **STARTING A COMPANY**  
Constitution, Shareholder and Director rights, powers and duties.
2. **RUNNING THE COMPANY**  
Reporting and meetings SME loans and important terms of personal guarantees.
3. **PROTECTING THE COMPANY**  
With business and keyman insurance.

# PROTECTING SHAREHOLDERS

## BIZ2 (1 DAY)

(with Buy-Sell Agreements)

BIZ2 counts towards CLPA Advanced Certification

This course covers:

1. **CROSS-PURCHASE AGREEMENTS**  
Trigger events. Insurance-funded plans.
2. **ANATOMY OF A BUY-SELL AGREEMENT**  
Excerpts of actual agreement. Examine how shares and funds are exchanged.
3. **TRUST-BASED AGREEMENTS**  
Insurance policies are held in trust to secure performance.

# PRACTICAL INSURANCE PLANNING

## PIP1 (1 DAY)

PIP1 counts towards CLPA Certification

This course covers:

1. **KEY CONCEPTS**  
Insurable interest and ownership. Regenerate funds for future generations.
2. **DISTRIBUTION OPTIONS**  
Comparing estate, nomination and assignment versus staggering proceeds.
3. **PLANNING SITUATIONS**  
Blended families, special needs, divorce, forever singles and many case studies.



# PRACTICAL INSURANCE PLANNING

## PIP2 (1 DAY)

PIP2 counts towards CLPA Advanced Certification

This course covers:

1. **ENGAGING THE HNW**  
The most common insurance products they purchase.
2. **PREMIUM FINANCING**  
When best to use.
3. **ADVANCED INSURANCE PRODUCTS**  
What products are suitable when HNW have illiquid assets and complex structures.

# PRACTICAL TRUST PLANNING

## PTP1 (1 DAY)

PIP1 counts towards CLPA Certification

This course covers:

1. **COMMON TRUST STRUCTURES**  
The 3 structures used by most Singapore families.
2. **FACT-FINDING**  
Use a simple process to effectively understand client needs.
3. **RELEVANT CASE STUDIES**  
Where life insurance forms the foundation of every estate plan.

# PRACTICAL TRUST PLANNING

## PTP2 (1 DAY)

PTP2 counts towards CLPA Advanced Certification

This course covers:

1. **ACTIVE LIVING TRUSTS**  
Trusts that are actively administered.
2. **PRIVATE TRUST COMPANIES**  
For those who want more control over their family trusts.
3. **FAMILY CONSTITUTION**  
The software and rules of managing the family and the family business.

# LEGACY PLANNING & REAL ESTATE

## ELE1 (1 DAY)

ELE1 is an Elective

This course covers:

1. **OWNERSHIP & STAMP DUTIES**  
Effects of death on property. Mitigating stamp duties.
2. **DIVORCE & PROPERTY**  
How divorce affects property ownership.
3. **LPA**  
How Form 1 v Form 2 affects property ownership.



# PROBATE & ESTATE ADMINISTRATION

## ELE2 (1 DAY)

ELE2 is an Elective

This course covers:

- 1. PROBATE**  
The court processes for non-Muslims, Muslims and foreigners.
- 2. ESTATE ADMINISTRATION**  
Calling in assets and settling liabilities.
- 3. ESTATE LIQUIDITY**  
Help families prepare for sufficient estate liquidity.



**Riverside**  
T r a i n i n g

Email: [info@riversidetraining.sg](mailto:info@riversidetraining.sg)  
Register at: [riversidetraining.sg/register](https://riversidetraining.sg/register)  
WhatsApp: +65 8938 6371