Riverside Training

Introducing the

CERTIFIED LEGACY PLANNING ASSOCIATE(CLPA) COURSE

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 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 for Locals & Foreigners, LPA Form 1/2, Professional Doneeship

MEP3
Divorce, Special Needs, Muslims

BUSINESS SITUATIONS

BIZ1
Business Structures, Keyperson Protection, Buy-Sell Agreements, Family Constitution & Office

INSURANCE APPLICATIONS

PIP1
Distribution Options, Planning Situations (blended family, divorce, singles & others), VUL, PPLI

TRUST APPLICATIONS

PTP1
Most commonly used trust structures - Testamentary, Standby, Insurance and Active Trusts, Private Trust Companies, Family Office

ELECTIVES

ELE1
Residential Property Ownership, Inheritance Rules, Divorce, Property Trusts, Stamp Duties

ELE2
Estate Admin for Singaporeans & Foreigners

PROGRESSION

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

LEVELS:	MODULES:
CLPA	MEP1, PTP1, BIZ1, PIP1
CLPA Advanced	To be updated
Electives	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.

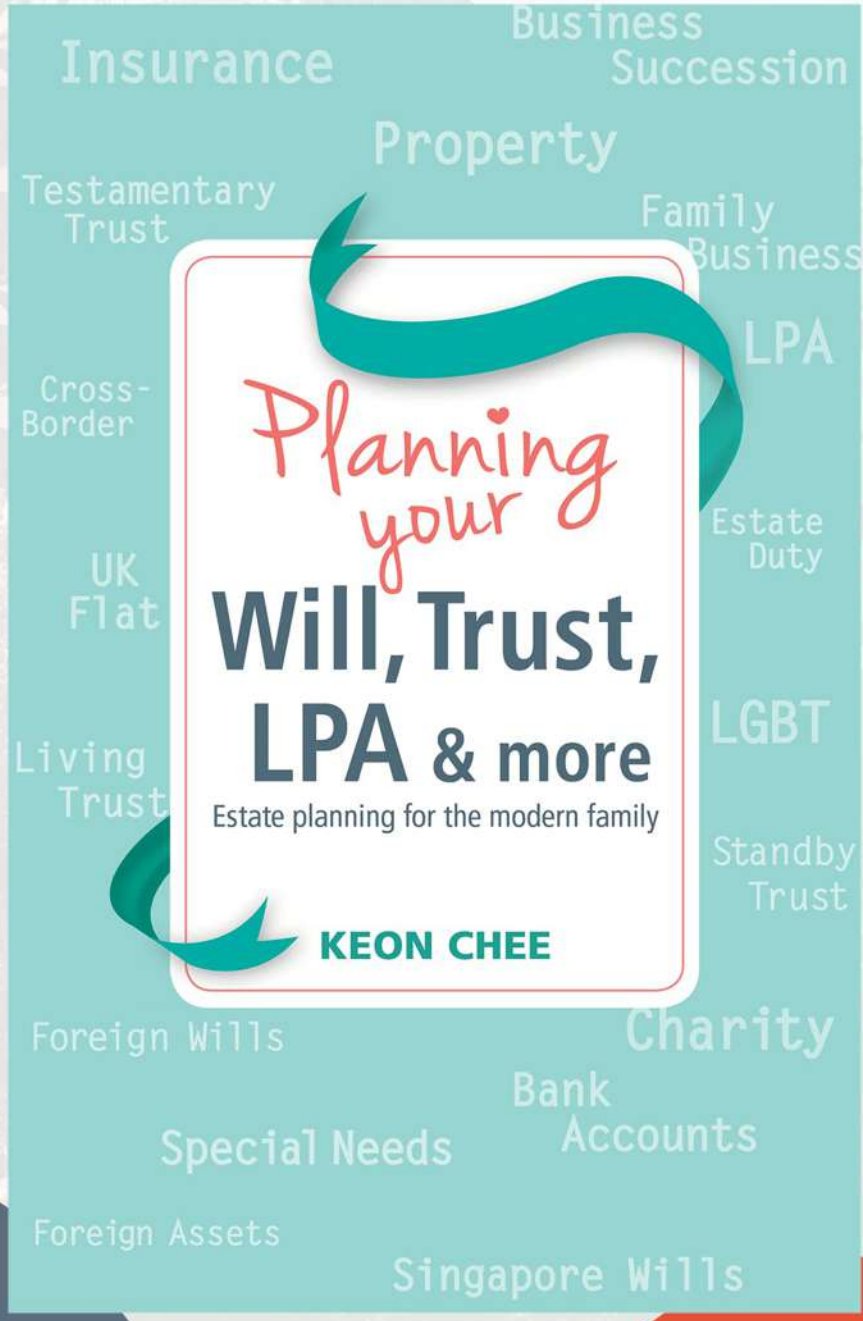
KEON CHEE
LLB MBA
Director and Founder
Riverside Training

"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**
   Singapore Wills for locals and foreigners.

2. **LPA FORM 1 & 2**
   Use Form 1 for basic situations. Use Form 2 to customise your wishes such as for business owners or you have special needs.

3. **Professional Doneeship**
   Appoint independent parties to act as your donee if you lose mental capacity.

4. **Professional Deputyship**
   Appoint independent parties to act as your deputy if you lose mental capacity.

PRACTICAL TRUST PLANNING
PTP1 (1 DAY)

PTP1 counts towards CLPA Certification

This course covers:

1. **COMMONLY USED BY SINGAPORE FAMILIES**
   Testamentary Trust, Standby Trusts and Insurance Trusts.

2. **COMMONLY USED BY HNW & FOREIGNERS**
   Active Trusts, Private Trust Companies.

3. **COMMONLY USED BY UHNW & FAMILY BUSINESSES**
   Family Offices

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.

4. **HNW INSURANCE**
   Variable Universal Life (VUL), Private Placement Life Insurance (PPLI)

RUNNING & PROTECTING A BUSINESS
BIZ1 (1 DAY) (with Keyman Insurance)

BIZ1 counts towards CLPA Certification

This course covers:

1. **STARTING & RUNNING A COMPANY**
   Constitution, Shareholder and Director rights, powers and duties.

2. **PROTECTING THE COMPANY**
   With business and keyperson insurance.

3. **PROTECTING THE SHAREHOLDERS**
   With Buy-Sell Agreements.

4. **PROTECTING THE FAMILY BUSINESS**
   Family constitution and family offices.

MODERN ESTATE PLANNING
MEP 3 (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.

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
Training

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