MODULE A – INTRODUCTION TO PROFESSIONAL ESTATE PLANNING

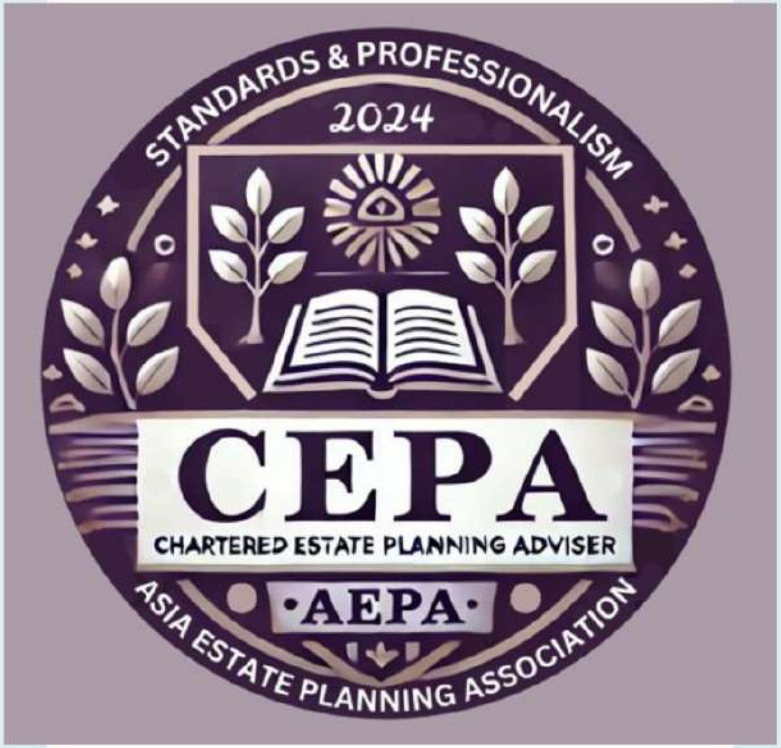
1. Introduction to 7 competencies estate planning
a. Law
b. Tax
c. Life Insurance
d. Estate Solvency & liquidity Analysis
e. Investment
f. Asset Structuring
g. Current Affairs & A.I.

2. Introduction to 3 generic markets of estate planning
a. Families – Traditional, blended, non-traditional family structures
b. Family Business Owners
c. Generational Wealth Owners

3. Estate Planning definition linking financial planning, law and tax to solve problems arising from death, mental incapacity & longevity risks

4. Estate Planning Ethical Code of Conduct

5. Construction of schedule of assets and liabilities with considerations of probate requirements in Singapore's situation



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6. Solvency and liquidity analysis of client's schedule of assets, liabilities and family tree

7. Current Affairs relevant to estate planning
a. Modern history of Singapore since 1965
b. Singapore's currency story
c. Singapore's structural strengths in attracting serious wealth globally

8. Legal aspects of Estate Planning
a. Problems of intestacy laws
b. Effects of marriage and divorce on estate planning

9. Tax aspects of Estate Planning
a. Estate income tax
b. Property tax from inheritance perspective

10. Case Studies

11. Assignment – To be completed one month after the class