MODULE B – FINANCIAL PLANNING RELEVANT TO ESTATE PLANNING

1. Solvency, Capital & Liquidity Analysis for estate pre-planning

2. Capitalisation of human life value (HLV)

3. Understanding loan contract
a. All money open mortgage
b. Event of default
c. Joint and several liabilities
d. Rights of set off

4. Co-mingling of inheritance

5. Investment planning
a. Investment policy statement
b. Sequence of return risk

6. Tax obligations of executor and trustee and beneficiaries of properties

7. Asset protection planning
a. Asset segregation strategies
b. Asset protection trust

8. Case studies

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

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