

ESTATISAN WORKSHOP

Join us! Unlock Opportunities with Creative Trust Planning

Objective:

Do you know how to leverage on creative trust planning techniques with insurance solutions?

Learn how to optimise estate planning outcomes for SME business owners.

Content:

1. Understanding the Needs and Objectives of SME Business Owners
2. How do you use insurance as a solution to solve their needs?
3. Real-Life Scenarios: Analysing Challenges and Solutions in Insurance-Based Trust Planning

WORKSHOP

**Date:**

5th April 2024, Friday

**Time:**

2.30pm – 4.30pm

**Venue:**

PreceptsGroup Office
10 Anson Road, #06-17
International Plaza Singapore 079903

\$10.90 per pax

To promote confirmed attendance,

- Only ESPs/EIs with a valid licence are allowed to register for this workshop.
- Strictly no refunds for no show.
- Drinks and snacks will be provided.
- A Precepts folder with presentation materials will be provided.



Conducted by:

ALAN WONG

Alan, a dedicated trainer, has immense passion for estate planning and has mentored numerous professionals to plan for their clients.

Through his deep understanding of estate planning, Alan has mastered the art of initiating conversations with clients, he seamlessly transitions into providing insurance as a solution to safeguard assets and ensure the smooth transfer of wealth.

Among his notable achievements, Alan secured a jumbo insurance case to fruition, which provided invaluable protection to the client.

Register Here

<https://bit.ly/estatisan>



Scan to register!



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