

ESTATISAN WORKSHOP

Will and Trust Planning for High Net Worth Individuals

Background:

In today's dynamic financial landscape, catering to high net worth individuals (HNWIs) demands specialised expertise.

With vast resources at their disposal, HNWIs seek sophisticated strategies for wealth preservation and growth.

Content:

1. Understand and be aware of the HNWI individuals' concerns, problems and pain points
2. Develop your Framework to present to HNWI individuals
3. Open up potential gaps with insurance as optimal solution

WORKSHOP

**Date:**

10th May 2024, Friday

**Time:**

9.30am – 11.30am

**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:**

DARREN TAN

TEP (Trust and Estate Practitioner), ChFC, MBA (UK)

Darren's eyes opened to Estate Planning when he was a young financial adviser. He saw the opportunities of being knowledgeable and equipped in this area to value add his clients.

Despite his experience, he has gone on a continuous learning journey to be competent and qualified as a Full member of STEP (Society of Trust and Estate Planning).

He understands the steep learning curve to grasp the width and breath of Estate Planning. He has helped and mentored numerous advisers through actual joint-field appointments and presentations.

Register Here

<https://bit.ly/estatisan>



Scan to register!



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