

## ESTATISAN WORKSHOP

# Systematic Approach for Comprehensive Estate Planning



### Objectives:

- Identify the **Beneficiaries** (Individuals, Entities, Social Good Causes, Legal Reps)
- Categorise the **Assets** available - Business, Real Properties, Personal Valuables, Insurance, Liquid Assets.
- **Conceptualising** how to accomplish Macro Intentions.

### Understand:

1. BAC (A B C) of Estate Planning
2. Macro Intentions for Various Life States
3. Structuring of Estate Plan(s)
4. Putting the Plan in Place



Conducted by

**LIM JUI SECK**

B Eng (Hons), GDBA, ACTS  
CFP®, AEPP®, STEP Affiliate

Jui Seck boasts over 55 years of diverse career experience, with the past two decades dedicated to Financial Planning and Estate Planning Services. His unwavering commitment to Estate Planning has been fortified by the profound value he sees in these services. This passion drives his dedicated focus on serving society through comprehensive estate planning solutions.

## WORKSHOP



**Date:**

30<sup>th</sup> May 2024, Thursday



**Time:**

2.30pm – 4.30pm



**Venue:**

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

Register Here

<https://bit.ly/estatisan>

\$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.



Scan to register!



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