ESTATISAN WORKSHOP

Navigating the ESP Journey: From Leads to Legacy

Introduction:

1. Identify your potential clients and how to filter non-suitable leads
2. Have clarity on your customer journey from the initial leads to the signing of the will/trust
3. Sharing of our business model & how to integrate insurance discussion
4. Managing expectations and how to communicate with the Will drafter

What you will learn:

— What are the demographics that is suitable for drafting a Will with Precepts

— How to segregate your leads and prospects

— The workflow and the entire customer journey

Conducted by

Bernard Fung CFP®, AEPP®

Lee You Yi AEPP®

Bernard Fung is a practicing Estate and Succession Practitioner with 16 years' experience in the financial advisory industry. Bernard's expertise and experience have earned him numerous invitations to seminars and talks, where he educates the audiences on the importance of holistic estate planning. He is also a guest lecturer for the Malaysia Law Institution, where he imparts his knowledge to students pursuing a diploma in professional will writing and estate planning. He is especially passionate about helping families with vulnerable members such as parents with special needs children. Bernard believes that estate planning is not a taboo topic to be avoided but the ultimate love letter to be handled with respect.

Attracted by the fulfilment of a meaningful career, Youyi joined the financial services industry to make a difference to people's lives. She has been in the financial industry for 8 years and currently a practicing Estate and Succession Practitioner.
As a strong advocate in financial planning, many clients have changed their perspective towards managing their finances after meeting her. Covering all aspects of wealth from protection, accumulation, preservation and distribution, she now specialises in retirement planning & estate planning focusing on maximising and preservation of wealth for clients who wishes to pass down a legacy for their loved ones.

WORKSHOP

Date:
30th July 2024, Tuesday

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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