



Singapore College  
of Insurance

# Real Estate Investment in Singapore:

A Legal Perspective  
- For Financial Planning Advisers

Only Training and Assessment route available



9.00 a.m - 5.00 p.m



12 CPD hours

Tutorial Date: 7 & 8 May 2026

Examination Date: 8 May 2026



Scan QR code or  
[click here to register](#)

# About the Programme

Real estate, especially in Asia, is a preferred asset class for investment and risk diversification. This course provides an in-depth exploration of real estate investment, financing tools, and transfer methods in Singapore. Participants will gain a comprehensive understanding of specific real estate issues related to estate planning, including considerations for single parents, families with special needs children, LGBT individuals, foreign properties, property holding entities, and solutions for estate equalization due to uneven property distribution.

The program includes latest case studies, many of which are based on actual court cases managed and litigated by the program lecturer.



## Target Audience

Financial advisers, wealth managers, bankers seeking to broaden their understanding of real estate transactions and investments in Singapore will benefit from this course. It equips them to offer holistic advice by integrating real estate into their clients' portfolios and enhances their understanding of how real estate aligns with comprehensive financial planning strategies, including advance care and legacy planning.

## Programme Outline

- Latest Legal & Tax Landscape & Cooling Measures
- Practical Aspects of Property Transaction
- Dispute Resolution
- Transfer of Ownership through Sale & Purchase
- Transfer of Ownership through Gift
- Transfer of Ownership through Trust
- Transfer of Ownership through Legacy Planning
- Transfer of Ownership through Matrimonial Proceedings
- Transfer of Ownership through LPA
- Relevant Issues concerning Property transfer
- Case Studies
- Opportunities



## Programme Schedule

**Date:** 7 & 8 May 2026



### Venue

To be advised



### Training Mode

In-person instructor-led programme



## Assessment

### Format

10 Multiple-choice Questions

### Duration

15 minutes

### Pass Requirement

70% or 7 correct answers

### Mode

On-site at the training venue

## Programme Fee



**Net Course Fee: S\$624.00**  
(incl. of 9% GST and after 70% STS funding)  
for Singapore Citizens aged 40 years old and above



**Net Course Fee: S\$944.00**  
(incl. of 9% GST and after 50% STS funding)  
for Singapore Citizens and Singapore Permanent Residents below 40 years old

Full Course Fee: S\$1,744.00 (incl. of 9% GST)

### FUNDING under IBF Standards Training Scheme (IBF-STS)

Only Singapore Citizens or Singapore Permanent Residents who are physically based in Singapore are eligible for funding.

#### For 70% course fee subsidies for Singapore Citizens aged 40 and above:

Course to commence with effect from 1 January 2023 and candidates to fulfil all the course requirements as well as pass all the examinations/assessments no later than 120 calendar days from the respective course end date(s) as stipulated by the IBF funding policy.

#### For 50% course fee subsidies for Singapore Citizens aged below 40 and all Singapore Permanent Residents:

Course to commence with effect from 1 January 2023 and candidates to fulfil all the course requirements as well as pass all the examinations/assessments no later than 120 calendar days from the respective course end date(s) as stipulated by the IBF funding policy.

#### Important Note :

For self-sponsored trainees, GST funding support has been removed with effect from 3 October 2022. In other words, self-sponsored trainees will have to pay the GST component in addition to the course fee for Course that commence from 3 October 2022.

For candidate who opts for net fee funding, SCI reserves the right to claw back the full amount from the candidate if he/she does not successfully complete the programme within the stipulated deadline.

### IBF-STS Funding Quantum

Training Courses		Commencing 1 Jan 2023	
Eligible Individuals <sup>[1]</sup>	Singapore Citizens and PRs	Singapore Citizens aged 40 years and above	
Funding Amount for Direct Training Costs <sup>[2]</sup>	50% capped at S\$3,000 per participant per course	70% capped at S\$3,000 per participant per course	

<sup>[1]</sup> Individuals who (i) attend the course in the capacity of an instructor or facilitator, e.g. presenter / speaker / panelist, or (ii) civil servants are not eligible for IBF-STS funding.

<sup>[2]</sup> Direct training cost would be based on the gross course fee charged by the external training provider or apportioned basic salaries of internal staff involved in developing and/ or delivering in-house courses. Qualifying expenses include training costs incurred for both executive and non-executive staff, as well as staff employed on a short-term basis (less than one year, inclusive of contract staff and interns). Apportioned basic salaries of full time in-house trainers involved in developing and/or delivering in-house courses will also be eligible for support.

Please refer to the [IBF website](#) for more details.

### SkillsFuture Credit

This is a SkillsFuture Credit-eligible course. For details, you may refer [here](#).

## Programme Registration

1. For company-sponsored participants, the financial institution will need to sign a Letter of Undertaking with the SCI before the registration can be confirmed.
2. For self-sponsored participant, he/she is required to sign a Clawback Contract with the SCI before the registration can be confirmed.



## Release of Results and SMART Certificate(s)

Participants will receive their results immediately upon completion of the assessment.

Upon fulfilling the attendance requirements for the module, a Certificate of Attendance will be issued within 5 working days after the lecture.

### About IBF Certification

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

Technical Skills and Competencies (TSCs)	Proficiency Level
Product Advisory	Level 4

Participants are encouraged to access the IBF MySkills Portfolio (<https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio>) to track their training progress and skills acquisition against the Skills Framework for Financial Services.

You may apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process [here](#).



“Trainer is very knowledgeable and very experienced in his field. Very interesting examples which made it easy for me to understand and relate to our course of work.”



### Profile of Lecturer

**Mr. Patrick Tan** is the founder of Fortis Law Corporation, established in 2003. With over 25 years of experience as a legal professional, he has built a practice renowned for its excellence in Private Client, Real Estate, Litigation and Dispute Resolution.

Under Patrick's visionary leadership, Fortis Law Corporation became the first law firm in Singapore to achieve PrimeLaw Practice Management Excellence Standard awarded by Law Society of Singapore in 2007. His commitment to professional development is demonstrated by his completion of the SAL-INSEAD Law Firm Leadership Programme and certifications from the Wealth Management Institute and the Singapore Institute of Directors.

Patrick's extensive experience and profound knowledge makes him well positioned to lecture for the course 'Real Estate Investment in Singapore: A Legal Perspective - For Financial Planning Advisers'. He has represented high-net-worth clients in trust advisory, asset protection, and complex multi-jurisdictional probate matters. His real estate expertise includes advising on tax implications, foreign ownership, and collective sale of landmark properties. As an approved CPD Trainer for the Council of Estate Agencies, Patrick is dedicated to educating and empowering financial planning advisers, offering them a comprehensive understanding of real estate transactions and investments within the Singapore context.

Patrick holds an LL.B. (Hons) (2nd Upper Class) from the University of Nottingham, where he received several academic awards in Land Law, Company Law, and Partnership Law. Furthering his legal education, Patrick earned a Graduate Diploma in Singapore Law (Merit) from NUS in 1999 and was called to the Singapore Bar in June 2000.

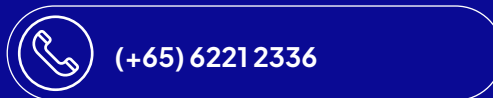


“Patrick Tan was crystal clear with his teaching.”

# 50 YEARS of

## Nurturing Talent and Building Capabilities

Contact the Program Manager



Scan to reach out to us

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Period of PEI Registration: 26-09-2023 to 25-09-2027