



Singapore College
of Insurance

Certified Private Wealth Specialist

Where Expertise Meets Exclusivity



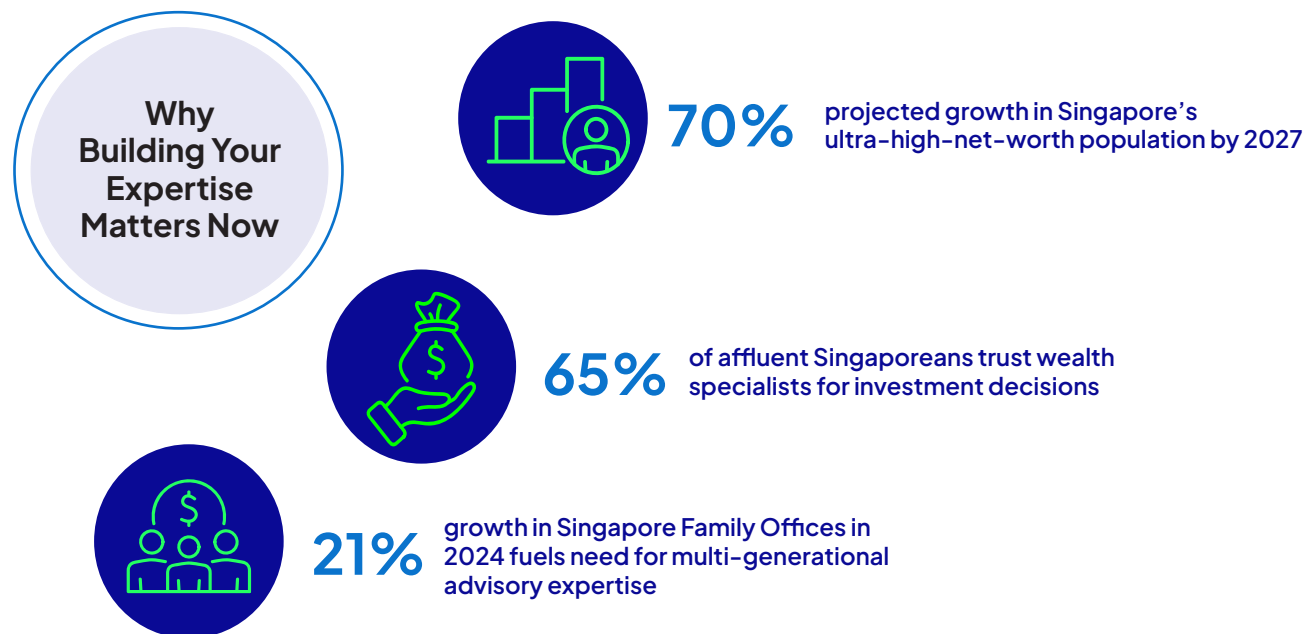
(MC) Certified Private Wealth Specialist

This is a stackable certificate course. The prefix MC denotes 'modular certificate'.

IBF Standards Training Scheme (IBF-STTS) and Union Training Assistance Programme (UTAP) funding support are available, subject to eligibility criteria.

Equipping Advisers to Preserve Legacies, Protect Futures

Build your credentials and elevate your ability to serve clients in risk management, business succession planning and advanced estate planning strategies through stackable learning that allows you to deepen your expertise to provide advisory services to High-Net-Worth Individuals (HNWI) with diverse and complex needs while earning recognized credentials along the way. This series will help you transform your learning into skills that equip you to have in-depth conversations with High-Net-Worth Individuals (HNWI) and provide them with solutions to mitigate their risk and serve their needs as a trusted wealth specialist.



Take the next step in your advisory journey with SCI's stackable learning programmes, designed to help you serve more complex client needs and stand out as a trusted private wealth advisor.

Four Specialist Programmes

1 Practical Techniques for Wills and Insurance Planning

Apply proven strategies to protect and preserve client wealth.

2 Advising High-Net-Worth (HNW) Business Owners and Insurance Planning

Deliver tailored solutions for entrepreneurial and business-focused clients.

3 Trust Advisory, Family Office, and Insurance Planning

Navigate the complexities of multi-generational wealth structures.

4 Advanced Estate Planning Strategies for High-Net-Worth Individuals (HNWI) and Business Owners

Design sophisticated estate solutions for complex client portfolios.

Certification Outcome:

Upon successful completion of all four programmes, you will be awarded the Certified Wealth Specialist designation, a mark of excellence in Private Wealth Advisory.

Why Pursue the Certified Private Wealth Specialist Qualification



Serve High-Net-Worth Clients with Confidence

Gain the technical knowledge, planning frameworks, and strategic insights to confidently guide high-net-worth individuals and business owners through even the most complex wealth challenges.



Expand Your Advisory Scope

Elevate your role from product provider to trusted strategist. Gain expertise in estate planning, business succession, family trusts, and intergenerational wealth transfer – areas that set elite advisers apart.



Learn from Practitioners Who Are at the Top of Their Game

Be mentored by seasoned practitioners with proven track records in private wealth advisory, estate law, trust structuring, and HNW planning. Learn directly from those who have advised at the highest levels.



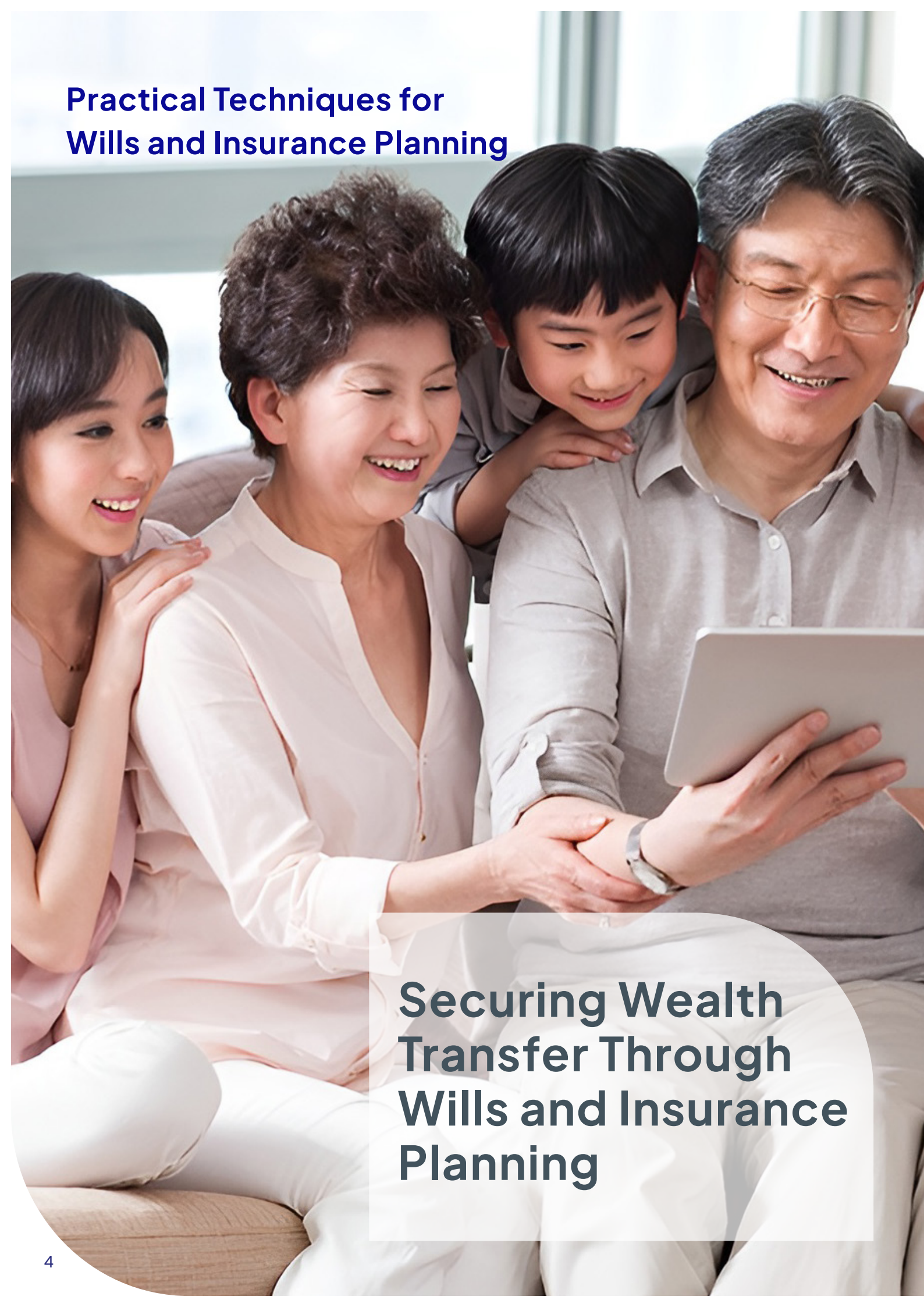
Real-World Application

Apply your learning through practical case studies based on real client scenarios – sharpening judgment, refining strategies, and strengthening your ability to deliver results-driven advice.



Stackable Learning

Advance at your own pace with a pathway that builds seamlessly from one programme to the next – strengthening your expertise, enhancing your credentials, and delivering immediate value to your high-net-worth clients.



Practical Techniques for Wills and Insurance Planning

Securing Wealth Transfer Through Wills and Insurance Planning

Practical Techniques for Wills and Insurance Planning



3

Day Course



18

CPD Hours



Proficiency
Level 4

IBF Technical Skills and
Competencies (TSCs) of
Legal Drafting and Writing

This course equips advisers with practical techniques to apply wills and insurance solutions in real client scenarios. You will learn how to identify planning needs, structure appropriate provisions, and use insurance to address liquidity and beneficiary objectives. A basic understanding of legal and financial concepts is all that's needed to start applying these skills in meaningful client conversations.

Target Audience

Designed for financial advisers and individuals with an interest in will writing and insurance planning. It is well suited for those looking to deepen their practical knowledge in structuring wills and applying insurance solutions to meet client needs.

Topics Covered

- Insurance Planning
- Wealth Creation
- Wealth Accumulation
- Wealth Preservation
- Wealth Utilization
- Wealth Transfer
- Wealth Equalization
- Wealth Protection
- Wealth Enhancement
- Wealth Distribution
- Will Planning
- Fact Finding
- Techniques on Will Writing
- Principles of Legally Enforceable Assets



Training Mode

Synchronous Facilitator-Led Training



Assessment Pass Requirement

70%



Duration

15 minutes



Format

Multiple-choice Questions



Scan the QR code to find out more



Advising High-Net-Worth (HNW) Business Owners and Insurance Planning

**Mitigating Risks and
Securing Legacies
Through Succession
Planning**

Advising High-Net-Worth (HNW) Business Owners and Insurance Planning



3

Day Course



18

CPD Hours



Proficiency
Level 4

IBF Technical Skills and
Competencies (TSCs) of
Legal Drafting and Writing

This course prepares advisers to address the complex needs of high-net-worth business owners by aligning personal and business planning through strategic insurance solutions. You will learn how to identify risks, structure insurance for business continuity and legacy protection, and deliver advice that integrates wealth, succession, and ownership priorities.

Target Audience

Financial advisers, wealth managers, or individuals seeking to deepen their expertise on the unique challenges and opportunities faced by HNW business owners. This course targets individuals who aim to provide comprehensive and tailored insurance solutions that align with the sophisticated needs and objectives of business owners.

Topics Covered

- Introduction to HNW Business Owners
- Sales Cycle
- Digital Skills
- Keyman Protection Planning
- Credit Protection Planning
- Deferred Compensation
- Business Succession Planning
- Retirement Planning
- Estate Planning
- Trust
- Will
- CPF Nominations
- Lasting Power of Attorney
- Advance Medical Directives
- Insurance Nominations



Training Mode

Synchronous Facilitator-Led Training



Assessment Pass Requirement

70%



Duration

15 minutes



Format

Multiple-choice Questions



Scan the QR code to find out more

A photograph of a multi-generational family enjoying time outdoors. In the center, a man with glasses and a light blue shirt over a white t-shirt is laughing while holding a young child in a white dress. A woman with dark hair is smiling and holding the child from behind. In the foreground, an older woman with grey hair is sitting in a blue folding chair, laughing and reaching out towards the child. An older man with grey hair is also sitting in a blue folding chair, looking up and laughing. They are all outdoors, with a large tree and green foliage in the background.

Trust Advisory, Family Office and Insurance Planning

Integrating Trust and Insurance Strategies for Family Office Success

Trust Advisory, Family Office and Insurance Planning



3

Day Course



18

CPD Hours



Proficiency
Level 4

IBF Technical Skills and
Competencies (TSCs) of
Legal Drafting and Writing

This course equips advisers to support high-net-worth clients with trust structures, family office planning, and strategic insurance solutions. You will learn when and how to introduce trusts, structure them effectively, and integrate insurance to protect wealth, enable succession, and support long-term family goals

Target Audience

Financial advisers, wealth managers, bankers seeking to deepen their expertise in the unique challenges and opportunities of Trust and family office advisory will benefit from this course. It is designed for individuals who aim to provide comprehensive and tailored insurance solutions that meet the complex needs and objectives of clients requiring Trust and Family Offices services.

Topics Covered

- Introduction to Trust Advisory and Family Office
- Understanding the Sales Cycle in Trust and Family Office
- Mastering Digital Skills for Prospecting in Trust and Family Office
- Wealth Creation and Wealth Distribution
- Understanding Trust as an Estate Planning Tool
- Understanding Family Office as an Estate Planning Tool
- Fact Finding in Trust and Family Office
- Trust Types
- Understanding Trust Setup
- Designing an Insurance Trust
- Trust & Insurance Planning
- Family Office and Insurance planning
- Governance Structures of the Family Unit
- Key Components of a Family Governance Framework
- Life insurance Solution tailored into Family Offices



Training Mode

Synchronous Facilitator-Led Training



Assessment Pass Requirement

70%



Duration

15 minutes



Format

Multiple-choice Questions



Scan the QR code to find out more

Advanced Estate Planning Strategies for High-Net-Worth-Individuals (HNWI) and Business Owners

A photograph of two men walking on a golf course. The man on the left is older, with grey hair, wearing a blue polo shirt and khaki pants, carrying a golf bag. The man on the right is younger, with dark hair, wearing a dark blue polo shirt and khaki pants, also carrying a golf bag. They are both smiling and looking towards the right. The background shows a golf course with palm trees and houses in the distance under a bright sky.

**Delivering Estate
Plans Client Trust
To Shape Legacies
That Last**

Advanced Estate Planning Strategies for High-Net-Worth-Individuals (HNWI) and Business Owners



3

Day Course



18

CPD Hours



Proficiency
Level 4

IBF Technical Skills and
Competencies (TSCs) of
Legal Drafting and Writing

This 100% case-based practicum equips financial advisers to apply the knowledge gained from the previous three courses to real-world estate planning challenges faced by high-net-worth clients. Through complex, scenario-driven exercises, participants will strengthen their ability to craft tailored estate and wealth distribution strategies that address succession, control, and legacy goals with confidence and clarity.

Target Audience

Designed for experienced financial advisers, wealth planners, and insurance professionals who work with high-net-worth individuals and business owners. It is ideal for those looking to deepen their technical knowledge in estate structuring, succession planning, and legacy preservation.

Topics Covered

- Succession, Estate Planning, Corporate Risk Management, Asset Protection, Wealth Preservation and Distribution Strategies For:
- Founder of Business
- Second Generation HNW Business Owners
- HNW Baby Boomers and Individuals
- HNW Senior Management



Training Mode

Synchronous Facilitator-Led Training



Assessment Pass Requirement

70%



Duration

1 hour and 30 minutes
(1.5)



Format

Multiple-choice Questions and
Individual Case Study Assignment



Scan the QR code to find out more

Programme Fee



Net Fee

Singapore Citizens
(40 years and above)

STS Funding: 70%

S\$936.00

Singapore Citizens (Under 40 years)
and Permanent Residents

STS Funding: 50%

S\$1,416.00

Full Course Fee= S\$2,616.00

Notes

- All course fees are inclusive of 9% GST
- STS Funding - IBF Standards Training Scheme (IBF-STS)



Hear from our course participants



As an estate planner focused on business and family succession, this programme helped deepen my understanding of the planning process, especially where it intersects with insurance. It reinforced that true success in our field isn't about product sales or commissions, but about the value we deliver to clients. If you're an estate planner who doesn't want to leave value on the table, this is a course you shouldn't miss.

Soo Hwee Pei (Amelie)

Senior Financial Consultant

Completer of Advanced Estate Planning Strategies for High-Net-Worth-Individuals (HNWI) and Business Owners

Having previously attended the course on advising HNW business owners, I enrolled in this programme to build on that foundation – and it delivered. It was far more in-depth and practical than others I've attended, packed with real-world examples and strategies. It gave me a stronger edge when engaging clients, offering perspectives they may not hear elsewhere. Every insurance or financial advisor should be equipped with the insights shared here.

Lim Sey Yong Joseph

Director, Advisory

Completer of Trust Advisory, Family Office and Insurance Planning

With 25 years in the industry, I work closely with HNW individuals and business owners whose needs go far beyond basic insurance. This course expanded my ability to design bespoke solutions that integrate business, estate, and legacy planning. The case studies, expert insights, and practical takeaways inspired innovative ways to address real-life financial challenges. In today's fast-moving financial landscape, staying ahead is not optional – it's essential.

Ong Wei Peng (Claudia)

Executive Personal Wealth Manager

Completer of Advising High-Net-Worth (HNW) Business Owners and Insurance Planning

I'm always looking to grow, and this course challenged me to rethink how I approach wills and insurance planning. It sharpened my thinking, improved how I ask questions, and strengthened the quality of my work. More than just skills, it empowered me to deliver deeper value to my clients. I believe this kind of training is what will elevate our profession for future generations.

Sam Siew Yin (Hazel)

Senior Financial Planner

Completer of Practical Techniques for Wills and Insurance Planning

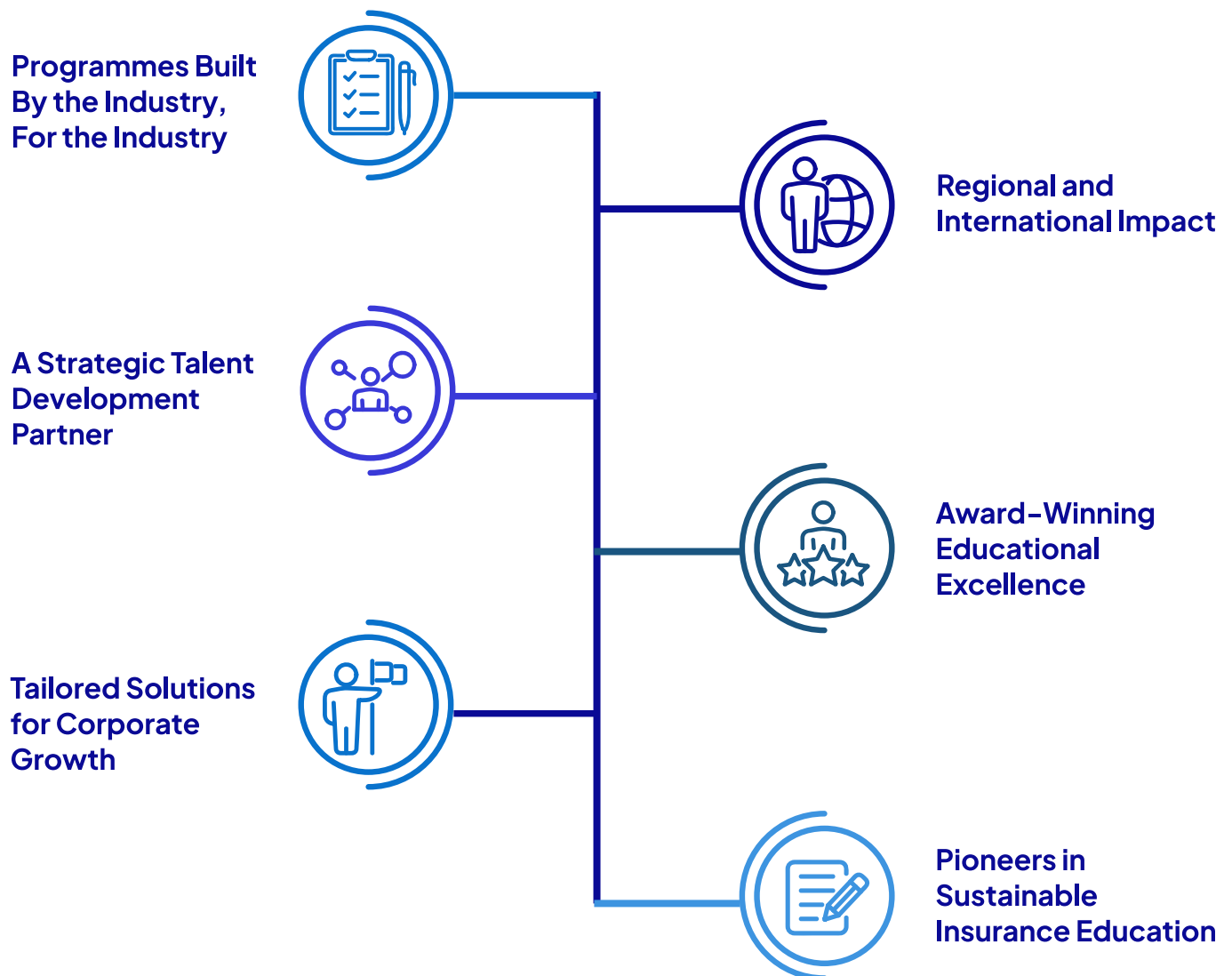


Note: Testimonials featured here were provided in 2025.

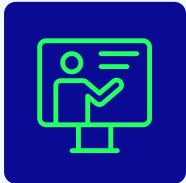
Experience the Difference When Partnering With Us

**50 Years of Empowering Talent Across 50 Countries
That Are Powering the Future of Insurance.**

For over 50 years, SCI has been the trusted partner in shaping talent and building capabilities for the insurance industry. From leading-edge training and professional certifications to tailored talent development programmes, we help professionals stay ahead in a fast-changing world. Today, we proudly serve clients across the globe — nurturing a future-ready workforce for the industry's next chapter.



How We Contribute to the Growth of the Industry



>1,700,000

Industry Professionals and Individuals Served to Date



>500,000

Examinations Candidates Served



>225

Courses Launched Each Year



Serving professionals from

>50

Countries

Our Suite of Services

Corporate Training Solutions



Examinations & Certifications

Executive Education



Financial Planning Certifications & Qualifications

General Insurance Qualifications



Life Insurance Qualifications

Talent Development



Technical Training

Profile of Lecturers



Mr. Stephen is currently the Principal Consultant of Summit Planners Group of Companies, providing one stop integrated financial services to individuals and business owners. He obtained his ACCA in 1987 at the age of 21 and started lecturing in the Institute of Certified Public Accountants of Singapore in the same year. He has trained more than 30,000 Financial Practitioners on finance-related topics.

Stephen is the author of five books: "Taxation Relevant to Insurance Practitioner", "Estate Planning Relevant to Financial Advisors", "Planning for Business Owners and Professional" and two other books which were written to prepare students for professional accountancy examinations.

Stephen specializes in Corporate Risk Management and Estate Planning. On the area of Corporate Risk Management, Stephen has been involved in designing solutions for business owners to minimize risk, with a particular emphasis on risk avoidance, risk prevention and risk transfer.

In the area of Estate Planning, Stephen assists many individuals (both Muslim and non Muslim) to plan for their estates, particularly the provision of immediate expenses upon death, the preservation of estate, the enhancement of estate and most importantly the distribution of estate.



Mr. Nathan Chew is currently the Vice President, Estate Planning and Business Consultancy of Summit Estate Services Pte Ltd, where he advises individuals, families and business owners on estate planning, wealth preservation and business succession strategies. He holds a Bachelor of Laws (Honours) from Birmingham City University and the STEP Certificate in International Trust Management and STEP Certificate in Foundations. With more than a decade of experience in the financial services industry, he combines legal principles with practical advisory experience to develop holistic solutions for clients.

Nathan specializes in Estate Planning, Business Succession Planning and Wealth Structuring, with a particular focus on high-net-worth individuals and business owners. His areas of expertise include Wills, trusts, insurance planning, Lasting Powers of Attorney, intergenerational wealth transfer and corporate succession planning. Beyond his consultancy work, Nathan is a regular trainer and speaker for financial practitioners, conducting practical and case study-based programmes to bridge the gap between technical knowledge and real-world implementation.

He is also a six-time Million Dollar Round Table (MDRT) qualifier, including one Top of the Table and two Court of the Table qualifications.



All lecturers are engaged on a part-time basis. SCl reserves the right to change the lecturer(s) and any other details. However, participants will be informed when these changes are made.

Lecturer-Participant ratio is 1:30 maximum for all PWS courses except for the Practical Techniques for Wills and Insurance Planning course. The ratio for Practical Techniques for Wills and Insurance Planning course is 1:40 maximum.

50 YEARS of

Nurturing Talent and Building Capabilities

Contact the Program Manager



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Scan to reach out to us

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Singapore College of Insurance

PEI Registration No.: 199408491M
Period of PEI Registration: 26-09-2023 to 25-09-2027