Singapore College of Insurance

# Certified Private Wealth Specialist

## Where Expertise Meets Exclusivity



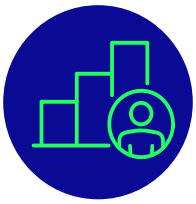
**(MC) Certified Private Wealth Specialist**
This is a stackable certificate course. The prefix MC denotes 'modular certificate'.

IBF Standards Training Scheme (IBF-STS) 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.

**Why Building Your Expertise Matters Now**



**70%** projected growth in Singapore's ultra-high-net-worth population by 2027



**65%** of affluent Singaporeans trust wealth specialists for investment decisions



**21%** growth in Singapore Family Offices in 2024 fuels need for multi-generational advisory expertise

**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.



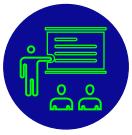
## Learn from Practitioners Who Are at the Top of Their Game

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.



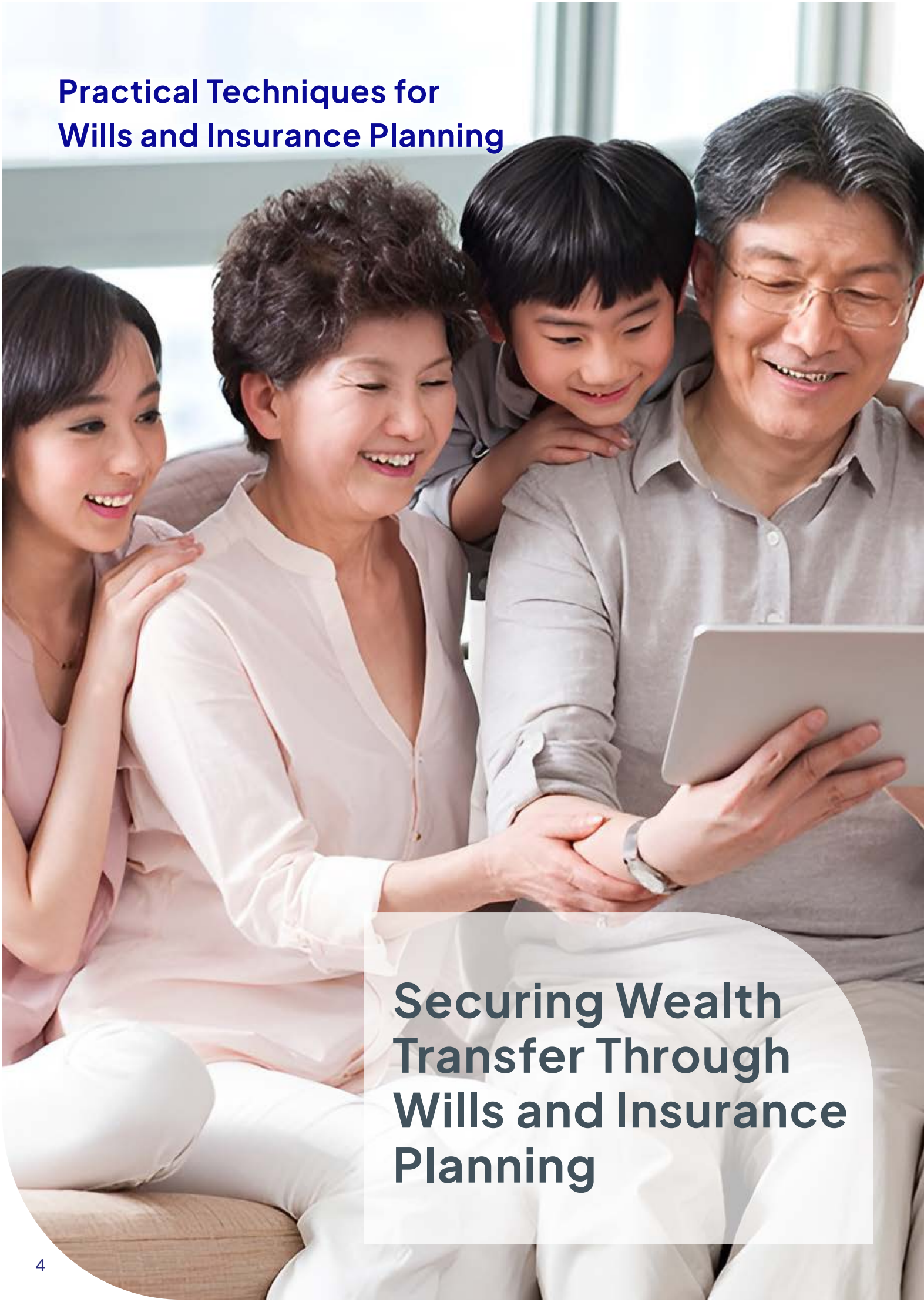
## Real-World Application

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.



# Securing Wealth Transfer Through Wills and Insurance Planning

Practical Techniques for Wills and Insurance Planning

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

Trust Advisory, Family Office, and Insurance Planning

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

# 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**



# 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 Product Advisory

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**



# 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 Wealth Planning Administration

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



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

Practical Techniques for Wills and Insurance Planning

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

Trust Advisory, Family Office, and Insurance Planning

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

# 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 Personal Finance Advisory

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

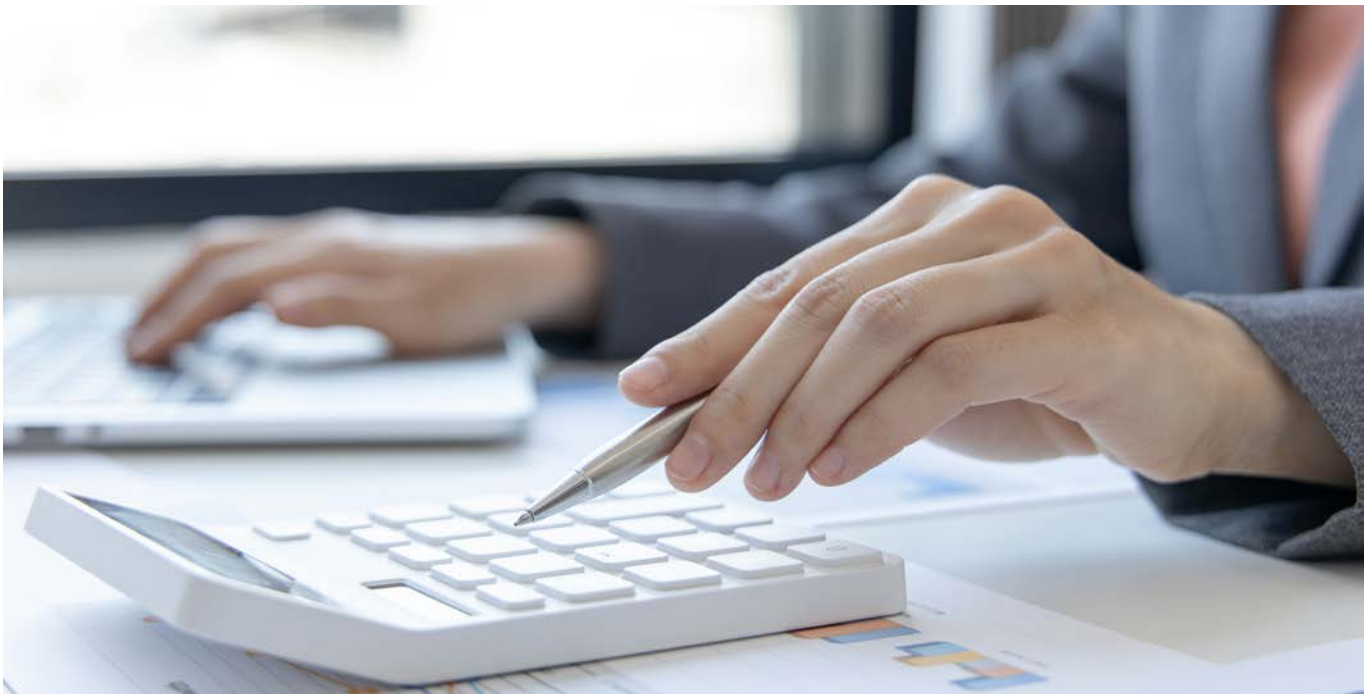
**Assessment Pass Requirement**
70%

**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)<br>STS Funding: 70% | Singapore Citizens (Under 40 years) and Permanent Residents<br>STS Funding: 50% |
|---|---|---|
| | S$936.00 | 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

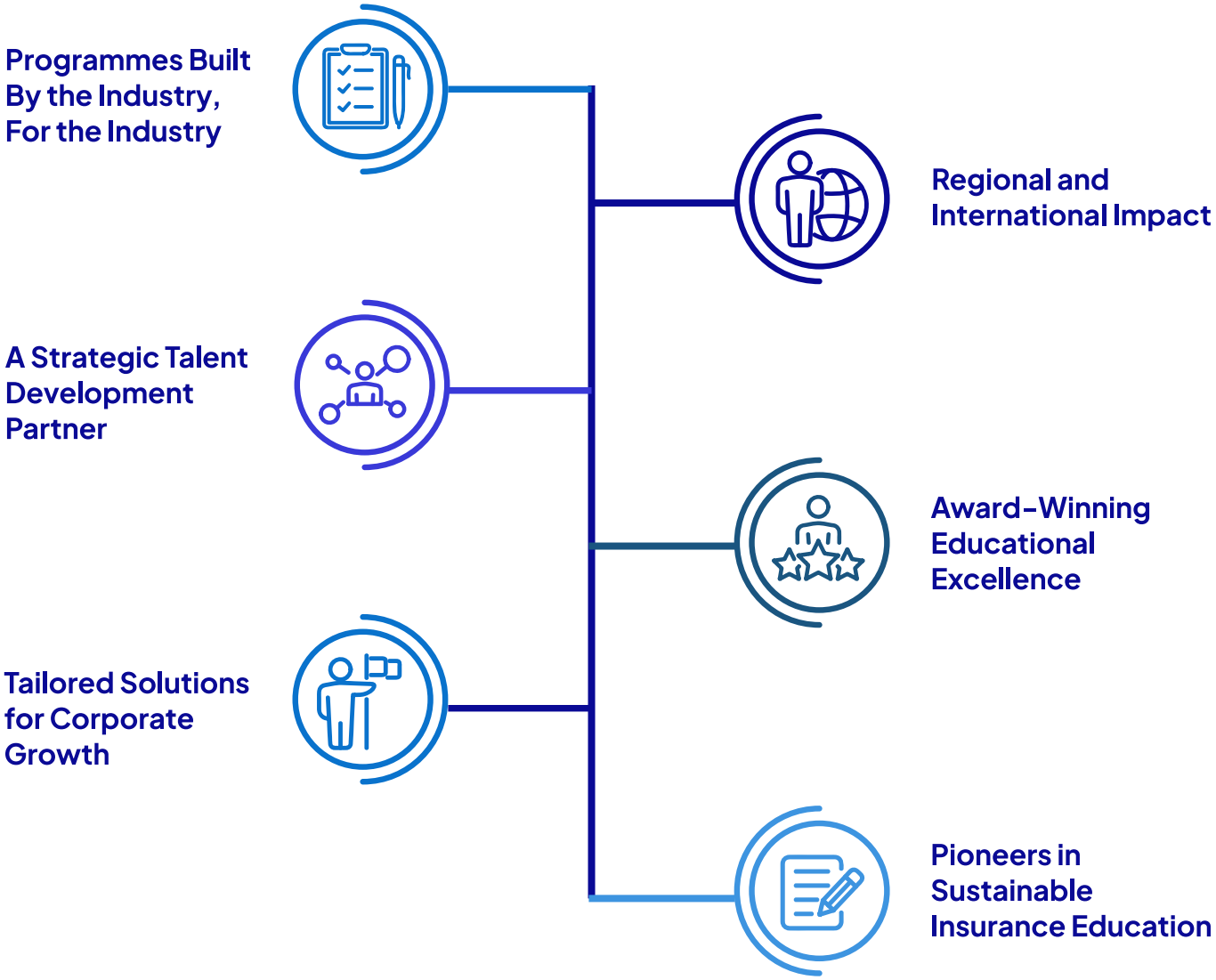
Completer of Practical Techniques for Wills and Insurance Planning

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. Nethan 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.

Nethan 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, Nethan 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. SCI 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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Singapore College of Insurance

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