FINERTY
ACADEMY

WHO ARE WE

Our journey began in 2011 and since then, Finerty Academy has been a leading one-stop training and education provider in the field of wealth empowerment and transformative leadership for financial leaders and consumers.

At Finerty Academy, we offer a wide range of programs such as utilizing transformative frameworks to equip participants with the skill sets to present impactful presentations, receive practical field-tested business models and processes to increase their business revenue. This enables them to provide strategic financial advice and drive positive outcomes while staying at the forefront of industry trends, regulations and best practices in today's dynamic business landscape.

Testament to the quality of what we provide, Finerty Academy has delivered training for over 2000 financial advisors and wealth planners from established financial institutions including DBS Bank, CIMB Bank, AIA Singapore, Avallis Financial, finexis advisory, Financial Alliance, Great Eastern, IPPFA, Manulife FA, NTUC Income, Phillip Securities, PIAS, Prudential, Promiseland, Singlife FA, Synergy, HSBC Life and more.

CORE OFFERINGS

Wealth Planning: Comprehensive training programs providing simple yet powerful frameworks and concepts in the area of comprehensive wealth, retirement, investment, insurance, estate and legacy planning.

Professional Certifications: Globally conferred professional Certified Financial Planner (CFP®) title and over 20 years of time-tested financial professional certification, Certified KASHGROWTH Professional (CKP™)

Leadership & Competency: Master the essential leadership skills such as team building, holistic personal well-being, awareness of the operational environment, and sensitivity to industry changes to navigate complex challenges, inspire teams, and drive organizational success.

Technology: Focused on emerging technologies like blockchain and artificial intelligence, providing participants with tools and skills to gain a competitive edge.

Communication and Sales Techniques: We delve into a wide range of techniques, including wealth languages, overcoming sales objections, utilizing storytelling to navigate challenging conversations. Our client profiling techniques empower you to build strong relationships and drive successful sales outcomes. We explore the psychology of buying, mastering verbal and nonverbal techniques, honing your listening skills, and utilizing various proprietary techniques and AI Tool to connect with clients on a deeper level.

WHY CHOOSE FINERTY ACADEMY?

Singapore IBF Accreditation	All our programmes are IBF Accredited and achieved the industry recognized quality that complied to the *Skillsfuture* Framework
Professional Certification	Approved Training Organization in Singapore, for CFP® Certification programme, the most desired and respected global certification in the financial planning industry
CPD Hours	CPD Courses including CORE CPD Hours are available for various financial industry segments
Price Competitiveness	We offer *preferential* corporate rates with IBF Funding, Skillsfuture Credit and UTAP Funding
Quality of Trainers	Our trainers are ACLP/ACTA Certified and industry veterans, minimally with 5 years of hands-on expertise in their respective fields and/or 3 years of financial training experience
Track Record	Since 2011, trusted by more than 30 corporations and over 2000 learners. 96% of learners are satisfied that the contents of the course meet their training needs
Learning Modes	E-Learning All Year Access Zoom Online Classes Facilitated Physical Classes
Teaching Style	Our learning methodology is centered on *adult learning pedagogy,* incorporating interactive elements, case studies, small group sharing, large group discussions with hands-on activities to foster a stimulating and memorable learning experience.

Tax Planning Workshop

Shawn Yap
Certified Financial Planner, CFP®, Chartered Financial Consultant®, ChFC®, IBF Advanced Level 3

Shawn Yap specialized in providing holistic financial planning, independent financial advice, and wealth management services since 2000. With more than 2 decades of professional expertise, his vision is to elevate wealth advisers to a level of professionalism surpassing doctors and lawyers by fostering a deep sense of duty to always act in our clients' best interests. His mission is to create an open and comprehensive platform for researching and developing wealth strategies. He founded Client Owned Adviser® and a seasoned trainer at Singapore Estate Agents Association (SEAA).

Beyond his financial advisory role, Shawn is a respected author, speaker, coach, and innovator. He has published several notable works, including "The Senior Portfolio," "Crowdfunding: Wise to Bank on the Wisdom of the Crowd?," "Singapore Today with Lance Alexander and Daniel Martin," "4 Ways to Manage Escalating Medical Premiums," and "Important Things to Know Before Making Property Investments." Through his writings and public speaking engagements, Shawn shares his insights and expertise to empower individuals and organizations to make informed financial decisions.

Tax Planning Workshop

1-Day Programme

Time: 9am to 530pm (Lunch 1pm to 2pm)

Zoom Online Training

This course provides a comprehensive overview of the Singapore tax system, equipping participants with the knowledge to navigate both personal and business income tax landscapes. Learners will delve into legal tax reduction strategies, focusing on practical planning techniques to minimize income tax liabilities. Furthermore, the course will explore the intricacies of real estate-related taxes, including rental income, stamp duties, and applicable deductibles, empowering individuals to optimize their tax obligations within the property sector. By understanding the tax regime and implementing strategic planning, attendees will gain valuable insights into maximizing financial efficiency and ensuring compliance with IRAS regulations.

Learning Objectives:

By the ends of this programme, learners are able to:

- Differentiate between eligible and disallowed business expenses.
- Avoid the common tax filing mistakes and declare income tax that in compliance with best practices.
- Identify & apply various CPF schemes and Supplementary Retirement Scheme (SRS) to reduce income tax.
- Interpret tax implications of property ownership such as capital gains, income tax, stamp duties, etc.

FINERTY
ACADEMY

LESSON PLAN

	Registration Welcome Learners	
DAY 1: 9am - 11am	**Lesson 1:** • Role of Financial Advisors in Tax Planning • Overview of Singapore Tax System	2 hour
	11am - 1115am (Break)	
DAY 1: 1115am - 1245pm	**Lesson 2:** • Business Structures and Tax Implications	1 hour 30 min
	1245pm - 145pm (Lunch)	
DAY 1: **145pm - 315pm**	**Lesson 3:** • Personal Tax Planning Tools	1 hour 30 min
	315pm - 330pm (Break)	
DAY 1: 330pm - 6pm	**Lesson 4:** Real Estate and Taxation Assessment	2 hour 30 min

SIGN UP NOW!

Email: contact@finerty.com.sg
Attention to Kyra Lim
Contact number: +65 96979201