
Leaving a Lasting Legacy (9:00am-5:30pm)

Course Title:

Leaving a Lasting Legacy

Course Fee:

S\$1,400 before GST

Mode of training:

Synchronous E-learning with online Assessment

About This Course:

This course equips financial advisors with advanced skills and tools to guide clients through meaningful legacy planning. Participants will explore legal, financial, emotional, and intergenerational aspects of legacy advisory, supported by case studies. The programme integrates Singapore-specific regulatory and tax guidance, and enables participants to deliver advisory strategies that align with both wealth transfer and family values.

What You'll Learn:

By the end of this course, participants will be able to:

- Understand the full spectrum of legacy planning tools (trusts, insurance, ILPs, philanthropic products)
- Identify and manage risks related to wealth transfer across generations
- Navigate Singapore's tax and legal landscape in legacy advisory
- Apply communication strategies for emotional and technical conversations
- Customise client solutions based on profiling, values, and succession goals
- Facilitate family collaboration and prepare heirs for responsible wealth management
- Address post-death execution planning and global estate considerations

Instructional Methods:

The program will be conducted through case studies, role plays, short lecturing, group discussions and sharing, personal reflections and peer learning.

This program is designed using adult learning concepts. Gayne's and/or KOLB's design theories are applied together with sound design principles and effective retention strategies in an active learning environment using different instructional methods so that different types of learners (Visual/Audio/Tactile/Kinaesthetic learners) can achieve the learning outcomes and subsequently transfer and apply their learnings in their workplace.

Target Audience:

Financial Planners, Bancassurance Specialists and Relationship Managers – Retail Banking

Time	Lesson Plan - DAY 1	Duration (Hours)
	Registration and Introduction	
9.00am – 10.30am	Lesson 1: Key Components of Legacy Planning Products <ul style="list-style-type: none"> - Introduction to Legacy Planning and its purpose. - Overview of trusts, life insurance, investment-linked plans, and philanthropic products. - Aligning financial products with client objectives. 	1 hour 30 mins
10.30am – 10.45am	15 Mins Break	
10.45am – 12.15pm	Lesson 2: Advising on Wealth Transfer and Risk Management <ul style="list-style-type: none"> - Structuring intergenerational wealth transfer. - Role of insurance and diversified investments in mitigating risks. - Case examples of successful wealth transfer strategies. 	1 hour 30 mins
12.15pm – 1.15 pm	1 Hour Lunch	
1.15 pm – 2.45pm	Lesson 3: Tax and Regulatory Considerations in Legacy Planning <ul style="list-style-type: none"> - Overview of Singapore's tax policies and inheritance rules. - MAS guidelines and ethical considerations for product advisory. - Strategies to minimize tax burdens for clients. 	1 hour 30 mins
2.45pm – 3.00pm	15 Mins Break	
3.00pm – 4.30pm	Lesson 4: Case Studies: Practical Applications of Legacy Planning <ul style="list-style-type: none"> - Real-world scenarios showcasing financial products in action. - Hands-on group activity: Evaluate client cases and recommend solutions. - Discussion and feedback on group solutions. 	1 hour 30 mins
4.30pm – 5.30pm	Assessment	1 hour
	Total Duration	7 hours

IBF Standards Training Scheme (IBF-STS)

This course has been accredited under the Skills Framework for Financial Services and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met.

Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.

The IBF-STS is available to eligible entities and individuals based on the prevalent funding eligibility, quantum and caps. IBF-STS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S3,000 per candidate per course subject to all eligibility criteria being met.

Find out more on www.ibf.org.sg.

About IBF Certification

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

- Product Advisory (proficiency level 3)

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 can 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 on <https://www.ibf.org.sg/home/for-individuals/ibf-certification/why-be-ibf-certified>.