DAY 1		
TIME	**ACTIVITY**	**REMARKS**
0900-0915	**Introduction** - Overview of Estate Planning for Sales Growth - Training Philosophy & Workshop Objectives - Timetable and Highlights	**Lecture**
	OVERVIEW OF ESTATE PLANNING	
0915-1030	**MODULE 1** **Lesson 1 (The Wealth Planning Market)** - Trends in the Wealth Planning Market - The Wealth Planning Model Presentation	**Lecture**
1030-1045	**Tea Break**	
1045-1230	**MODULE 2** **Lesson 2 (Estate Planning Basics)** - Estate Planning Funnel Presentation - ROLE PLAY of the Estate Planning Funnel Presentation - Objectives & Deliverables in the Estate Planning Process - ROLE PLAY of the Objectives & Deliverables in Estate Planning	**Pair up for role play**
1230-1330	**Lunch Break**	
1330-1500	**Lesson 3 (Estate Planning Considerations)** - Concept of Domicile, Dollars, Distribution & Duty - Understanding Complexities and Assumptions of Domicile	**Lecture / Case Studies**

	- Specific Objectives in Estate Planning (Financial/Tax (What), Legal (How) and Social (Who) Aspects) - Case Studies of Pitfalls in Estate Planning - Profile of Estate Planning prospects	
1500-1515	**Tea Break**	
	THE SCIENCE OF ESTATE PLANNING	
1515-1600	**MODULE 3** **Lesson 4 (Dollars – Financial & Tax Aspects)** - Wealth Distribution (Dollars) as a function of Wealth Accumulation & Protection planning - Identifying Short and Long Term estate needs - Avoiding Major Mistakes in Wealth Accumulation for Estate Planning purposes - Introduction of current Estate Taxes around the World - Working with clients having assets outside of Singapore - Practical Applications & Case Studies in solving 'Dollar' problems in Estate Planning	**Lecture / Case Studies**
1600-1700	**MODULE 4** **Lesson 5 (Distribution – Legal Aspects Part I)** - Role of Laws & Statutes in Estate Planning - Understanding Probate and Non-Probate Assets - Movable and Immovable Assets in Estate Planning - Significance of owning Immovable Assets Abroad - Probate Assets – understanding the application of Wills and consequences of Intestate Succession - Will Planning as a critical part of Estate Planning - Case studies in proper use of Wills & consequences of Intestate Succession	**Lecture / Case Studies**

DAY 2		
TIME	**ACTIVITY**	**REMARKS**
0900-1030	**Lesson 6 (Distribution – Legal Aspects Part II)** - Non-Probate Assets – understanding the applications of 'Non-Will' instruments in Estate Planning - Applications of Survivorship concepts and its exceptions - CPF Nominations and Overview of the Nomination of Beneficiaries (NOB) Framework under the Insurance Act - Applying Section 49L, Section 49M of NOB, Assignments, Cross Purchase Life Insurance and concept of insurable interest - Case studies in effective use of Survivorship and NOB concepts in Estate Planning	**Lecture / Case Studies**
1030-1045	**Tea Break**	
1045-1230	**Lesson 7 (Distribution – Legal Aspects Part III)** - Introduction to Trust - Understanding types of trusts and its uses (revocable, irrevocable, fixed, discretionary) - Applications of trust in Estate Planning (Section 49L of Insurance Act as a simple type of trust) - Introduction to Estate Planning for Business Owners (simple concepts in buy-sell, keyman) - Case studies and Role Play in introducing Trust in Estate Planning	**Lecture / Case Studies**
1230-1330	**Lunch Break**	
1330-1500	**Lesson 8 (Distribution - Legal Aspects Part IV)** - Using the Wealth Distribution Grid as a Fact Finder - Delivering a comprehensive Estate Planning Solution to a client - Case Studies and Role Plays in Comprehensive Fact-Finding and Presenting Solutions	**Lecture / Case Studies**

1500-1515	**Tea Break**	
1515-1700	**MODULE 5** **Lesson 9 (Duty – Social Aspects Part I)** - Understanding Social Issues affecting Estate Planning - Uncovering and planning around social issues with clients Presenting the 'deliverables' in Estate Planning (Fact-Finding, Document Management Exercise, Asset & Document Inventory)	**Lecture / Case Studies**
	DAY 3	
TIME	**ACTIVITY**	**REMARKS**
0900-0945	**Review of Day 1 and 2**	**Lecture**
	ART OF ESTATE PLANNING	
0945-1045	**Case Study 1** - ROLE PLAY of the Wealth Planning Model Presentation - Scenario Building and Practical Application	**Case Study / Role Play**
1045-1100	**Tea Break**	
1100-1230	**Case Study 2** - ROLE PLAY of the Estate Planning Funnel Presentation - Scenario Building and Practical Application	**Case Study / Role Play**
1230-1330	**Lunch Break**	
1330-1500	**Case Study 3** - ROLE PLAY of the ROLE PLAY of the Wealth Planning Model Presentation - Scenario Building and Practical Application	**Case Study / Role Play**
1500-1515	**Tea Break**	
1515-1645	**Case Study 4** - ROLE PLAY of the Estate Planning Funnel Presentation - Scenario Building and Practical Application	**Case Study / Role Play**
1645-1700	**End of Course Evaluation**	