<u>Rockwills Estate Planner (REP) Training</u>

With the growing affluence of many Singaporeans today, your clients will look to you for professional advice and the recommendation of products to achieve their objectives for investment, insurance, wealth management, protection, estate planning and succession. Being a REP, you will be better equipped to meet the demands of your client by going through our comprehensive training program which covers the legal and marketing aspects of the business.

A person wishing to join us as a REP will have to attend a 3.5 day Wills & Trusts training session. These sessions start at 9.00am and end at 5.00pm (except for the last day of Wills training which ends at 1.00pm). You may refer to the general course outline as appended below:

Rockwills Estate Planner (REP) Training Schedule

(2½ days Wills Training)

DAY ONE

Time	**Subject**
09:00am – 09:15am	Registration
09:15am – 10:30am	Introduction to Rockwills Estate Planning
10:30am – 10:45am	Tea Break
10:45am – 12:30pm	Estate Planning Through Wills (Introduction to Wills Law)
12:30pm – 02:00pm	Lunch
02:00pm – 03:30pm	Estate Planning Through Wills - Continuation / Introduction to WWIF
03:30pm – 03:45pm	Tea Break
03:45pm – 05:00pm	Estate Planning Through Wills – Continuation / Introduction to WWIF

DAY TWO

Time	**Subject**
09:00am – 10:15am	Workflow and Attestation
10:15am – 10:30am	Tea Break
10:30am – 12:30pm	Introduction to Estate Administration
12:30pm – 02:00pm	Lunch
02:00pm – 04:30pm	More on Wills Law (Case Studies)

DAY THREE

Time	Subject
09:15am – 10:15am	Wills Law Exam
10:15am – 10:30am	Tea Break
10:30am – 11:15am	Rockwills A Lucrative Business
11:15am – 12:00pm	Building Your Estate Planning Business
12:00pm – 12:30pm	Review of Starter Kit

Rockwills Estate Planner (REP) Training Schedule

(1 day Trusts Training)

Time	Subject
09:00am – 09:15am	Registration
09:15am – 10:15am	Introduction to Trust
10:15am – 10:45am	Tea Break
10:45am – 12:00pm	Categories and purpose of a Trust
12:00pm – 01:30pm	Lunch
01:30pm – 02:30pm	Introducing, Facilitating and Creating Trust
02:30pm – 03:00pm	The Trustee Services at Rockwills Trustee Ltd (RTS)
03:00pm – 03:30pm	Tea Break
03:30pm – 04:00pm	Q&A

These sessions are conducted by several industry specialists. They are:

Mr Lee Chiwi (CEO of Rockwills Group of Companies in Singapore)

Lee Chiwi was called to the Bar of England & Wales as a Barrister-at-Law in 1986 and admitted as an Advocate & Solicitor of Singapore in 1988. During his time as a legal practitioner, his areas of practice were focused on corporate, commercial and private client work. In early 2008, he joined the Rockwills Group in Singapore as CEO. He is the author of various books including "The Rockwills Guide to Succession and Trusts in Wealth Management" (2008), and "Drafting of Trusts and Will Trusts in Singapore" which he co-authored with the principal author James Kessler Q.C. (2007). Since 2004, Lee Chiwi has been appointed as adjunct faculty member of the Singapore Management University for their Wealth Management MSc Program, lecturing in Tax and Estate Planning.

Mr John Sim (CERTIFIED FINANCIAL PLANNER® (CFP®), Associate Estate Planning Practitioner (AEPPTM), Masters of Science, Computer Science and Information Systems)

John Sim is a passionate believer that education is key to achieving success in life. He acts out this believe through Eduvantage Pte Ltd, a social enterprise he founded in 2011 that conducts complimentary seminars in the areas of wealth optimization, healthy living and relationship building. After graduating with an Honors (2nd Upper) degree in Computer Science and Information Systems from the National University of Singapore, he stayed on to teach in NUS for 2 years while concurrently earning his Master of Science degree. Since 2013, he has followed his passion for financial planning and embarked in a new direction by starting his financial advisory business with IPP Financial Advisers Pte Ltd (IPPFA), the largest independently owned financial advisory firm in Singapore. He also lectures at Rockwills Institute in the area of estate planning. Through Eduvatange and IPPFA, he aims to help improve the lives of people, with a focus on families with members who have special needs