STEP CERTIFICATE FOR FINANCIAL SERVICES – TRUSTS AND ESTATE PLANNING, SINGAPORE

Developing financial services professionals' ability to offer trusts and estate planning advice to their clients

This Certificate has been developed to help financial intermediaries understand the legal issues concerned in financial and estate planning in Singapore. It is the only trust and estate planning qualification that addresses the common ground between estate planning specialists and those working in the financial services sector.

Completing this qualification will:

- Enhance your ability to give holistic advice to clients as a "trusted advisor".
- Help you develop your own professional technical competence.
- Enable you to work more effectively with estate planning specialists.
- Provide 30 Entry Level credits which can be used towards your STEP Membership.

For full details of the Certificate including dates and enrolment information, please visit **www.step.org/CertFSS**

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ADVISING FAMILIES ACROSS GENERATIONS

Lee Chiwi TEP is the author of the manual for the STEP Certificate for Financial Services - Trusts and Estate Planning, Singapore. He joined British and Malayan Trustees Limited (BMT) as its CEO in 2005 until 2007. In early 2008, he joined the Rockwills Group in Singapore as CEO. Rockwills focuses on the fields of wills, estate planning, the administration of trusts and onshore and offshore corporate structures. Lee Chiwi will lecture on **Aspects of personal law; Will trusts; and The Philanthropic Client. Lee Chiwi will also facilitate the training in all modules.**

Alfred Lim is an Advocate and Solicitor and a director of Fullerton Law Chambers LLC. His practice is primarily in commercial litigation and arbitration. Alfred has acted in matters at all levels of the Singapore courts as well as in ad-hoc and institutional arbitrations. He also performs various front-end non-contentious work including drafting, reviewing and advising on various standard forms and general commercial contracts. Alfred obtained his Bachelor of Engineering, Civil (Honours) from the National University of Singapore before obtaining his LL.B. (Honours) on its accelerated Graduate LL.B. Programme. Prior to commencing private practice, Alfred was a former prosecutor with the Ministry of Manpower and the Attorney-General's Chambers. Alfred regularly advises high net-worth clients on estate planning which includes drafting of wills, setting up of trusts to manage a family's assets, submission of Lasting Powers of Attorney to the Office of Public Guardian, as well as general probate, trust and estate matters. Alfred Lim will lecture on **Wills and Intestate Succession.**

Gopalan Raman has been the course co-ordinator for wills, probate and administration for the postgraduate practice law course conducted by the Board of Legal Education, Singapore, since 1986 in which time he has written extensively on the subject as well as holding senior positions at the Law Society, Singapore and the Institute of Arbitrators. Gopalan Raman will lecture on **Probate and Letters of Administration and other Ancillaries.**

Dr Tang Hang Wu is an Associate Professor at the Faculty of Law, National University of Singapore where he teaches and writes on the law of property, equity, trusts and restitution. Hang Wu has published widely in international peer-reviewed journals and his publications have been cited many times in leading works and law journals. Dr Tang Hang Wu will lecture on **Regulation of Singapore Trusts.**

David Chee, Director, Drew & Napier, is a private client specialist. His principal area of practice is trusts and estate planning. David advises high net worth clients on all aspects of their estate planning needs ranging from simple wills to setting up structures that address concerns such as (i) asset transfers from one generation to another (ii) asset protection and preservation (iii) tax efficiency (iv) family governance and (v) philanthropy. David has over 10 years of experience in the industry, having worked as a legal counsel in trust companies and a wealth planner in private banks. His familiarity with international tax and trust structures, insurance solutions, asset management, and strong network with players within the wealth management industry enables him to provide holistic advice to clients. David also advises professional trustees on various matters related to trust business. This encompasses areas such as (i) regulatory requirements (ii) fiduciary risk and obligations and (iii) administration of trusts and estates. David also has a passion in helping clients structure and implement their philanthropic causes locally and overseas. David Chee will lecture on **Trusts (an Introduction and Classification).**

Sadali Rasban is a widely known consultant and author specializing in Shariah Law. In addition Sadali has conducted training, workshops and seminars to the public and to financial advisors on matters related to estate planning, estate distribution and zakat. Sadali Rasban will lecture on **Muslim Inheritance and Estates in Singapore.**

Leong Mun Kid graduated with a law degree from the University of London. He is an affiliate member of STEP and has a Certificate in Trust Services (CTS) with Wealth Management Institute Pte Ltd (WMI). He is the head of department for trust in Rockwills Trustee Ltd and has been appointed as a resident manager under criteria set out by MAS for a licensed trust company. He manages the setting up and administration of trusts in Rockwills Trustee Ltd and assists clients in their estate and trust planning. Prior to joining Rockwills Trustee Ltd, Mun Kid was a manager in the legacy planning department in Rockwills Trustee Bhd (Malaysia) taking charge of setting up private trusts for clients. He has been with the Rockwills group of companies since 2011 and has helped more than a hundred families with their estate and trust planning. Leong Mun Kid will lecture on **Trusts used in Financial Services and Trustee Duties.**

Michael Seow, a 25 years veteran in the Financial Planning Industry, both as an insurance practitioner and agency leader, has nurtured several Agency Leaders/Supervisors as well as MDRT producers. Michael is currently leading a group of about 70 advisers in The Prudential Assurance Company (Singapore) Pte. Ltd where he is Senior Financial Services Director. He has specialised in Business Succession Planning since 2000 and has also conducted numerous related courses for both the Industry as well as his own company, sharing personal experiences and case studies in this very challenging segment of the business in the Insurance Industry. Michael Seow will lecture on **Business Succession and Trusts used in Financial Services**.

S Sharma TEP has more than 20 years of practical legal and tax experience. He has been a District Judge and Deputy Registrar in the Subordinate Courts, State Counsel in the Attorney-General's Chambers specialising in legislative drafting, advisor and counsel to the Government in taxation matters, especially with the Inland Revenue Authority of Singapore. He has also been tax partner in private practice with a couple of the largest law firms in Singapore. Sharma will lecture on **The Taxation of Trusts.**

Ang Kim Lan TEP is a member of the Singapore Insurance Institute as well as the Society of the Financial Services Professionals and is the Honorary Legal Adviser for the Singapore Insurance Brokers Association. Ang Kim Lan works at Goodwins Law Corporation, where she oversees the Insurance and Financial Services Department, advising clients who include life insurers, general insurers and insurance intermediaries and financial advisers. She also oversees the Trusts Department, advising clients on how to use trusts effectively as well as advising trust companies on compliance issues. Ang Kim Lan will lecture on the **Incapacitated Client.**

THE COURSE FACILITATOR IS ROCKWILLS INSTITUTE PTE LTD AND THE TEACHING TEAM COMPRISES SOME OF THE LEADING PRACTITIONERS IN SINGAPORE

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