ESTATE PLANNING Master Class '08

By Lim Yuen Seong FChFP, RFP, CFMC, MScFP, FLMI

A NEWLY DEVELOPED 2-Part (4 days) Estate Planning Training Program designed to equip financial practitioners with technical knowledge, skill-sets, ideas and innovative processes to support life insurance advisory and selling activities.

Part I (2 days)
Gateway to Estate & Wealth Planning

Program Outline:

Concept of Estate & Wealth Planning

- Estate & Wealth Planning
  - ✓ Barriers
  - ✓ Purpose
  - ✓ Plan Design
  - ✓ Execution
- Personalities in Estate Planning
  - ✓ Professionals in the team
  - ✓ Executors, trustees, guardians
  - ✓ Assignment of responsibilities

Phases in Estate & Wealth Planning

Associated legal & financial concepts concerning:

- Phase 1- Creation/Accumulation
  - ✓ Savings, Investment & Insurance
  - ✓ Business & Intellectual property
- Phase 2- Protection/Preservation
  - ✓ Legal Arrangements
  - ✓ Financing Arrangements
  - ✓ Risk Management
- Phase 3- Application/Distribution
  - ✓ Retirement Needs
  - ✓ Family Needs
  - ✓ Religious Needs
  - ✓ Charitable Needs

The Concept of Estate & Wealth

- Understanding Estate & Wealth
  - ✓ Terminologies
  - ✓ Definitions
- Estate Property & Related Concepts
  - ✓ Meaning of property
  - ✓ Classification of property
  - ✓ Possession and title
  - ✓ Land laws
  - ✓ Types of ownership
  - ✓ Probate & non-probate property
- Property Transfer Rules, Instruments, and Legal Processes
  - ✓ Testacy, Intestacy, partial intestacy rules
  - ✓ Probate processes
  - ✓ Legal instruments
  - ✓ Islamic distribution rules

Part II (2 days)
Ultimate Innovation: Stairways & Ideas

Program Outline:

Strategic Planning Structure

- Hierarchy of Planning Objectives
  - ✓ Financial independence
  - ✓ Family legacy
  - ✓ Social capital legacy
- Estate & Wealth Planning Process
  - ✓ The planning process
    - Step-by-step on 'What and how to do'
    - Types of documentation
- Case Studies in Estate Planning
  - ✓ Wills & life insurance
  - ✓ Trusts & life insurance

The Marketing & Sales Perspectives

- Life Insurance Sales Ideas from Estate Planning
  - ✓ Using the trust concept
  - ✓ Using the will concept
  - ✓ Using the business buy-sell concept
  - ✓ Using the charity concept
- Estate Planning Sales Process & Strategies
  - ✓ Approaching
  - ✓ Engaging
  - ✓ Concluding
  - ✓ Reviewing

Value Added: A **FREE** personalised soft-copy of Estate Planning Presentation will be provided to the participant

This program is also available IN-HOUSE upon request with at least 2-month advance booking. For details, please contact 03-92055105 or email to info@brainstation.com.my

REGISTRATION FORM

Course Title: ESTATE PLANNING Master Class '08

Course Venue:________________________________

Course Date:________________________________

Participants' Particulars

Name:____

H/P No:____

Email: ____

Company: ____

Company/Private Correspondence Address:____________________

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Phone: (   )______________________________________

Fax: (   ) ______________________________________

Payment Particulars

Registration Fee: RM 1,300 per participant

Pioneer Batch Special Rate: RM1,100 per participant
(applicable for July-August 08 Intakes only)

Enclosed my cheque No.________________ payable to "BrainStation Academy Sdn Bhd"

or

Direct bank-in to BrainStation Academy's Account:

Bank: Maybank Berhad

A/C No.: 5-1404-8217-66-0

Please enclose a copy of your bank-in slip

Signature: Date:

WHO SHOULD ATTEND

Life Insurance Agents, Financial Advisors and Agency Managers, Trainers and Management staffs of insurance companies, banks, unit trust companies and financial services firms.

ABOUT THE TRAINER & COACH

Yuen Seong is regionally renowned for providing tailor-made training and coaching sessions to top producers and agencies and designing training programmes and presentation materials for financial services companies.

For over two decades, he was involved in the life insurance and financial services sector as a practitioner, manager, mentor, coach, industry leader and author. He is considered by many to be the foremost authority in business risk management and succession planning in this region. He has spoken on the subject both locally and internationally, i.e. Malaysia, Singapore, Indonesia, Thailand, Vietnam, China and Taiwan.

Yuen Seong authored over 20 books of which 6 are on Business Insurance and Estate Planning, namely:

- ✓ Business Insurance - Concept Mastery
- ✓ Business Insurance - Million Dollar Concepts
- ✓ Safeguard your Business with Keyman Insurance
- ✓ Supporting Business Succession Planning with an Insured Buy-Sell Agreement
- ✓ Estate Planning I & II

He also authored and co-authored several of the course materials for the CFP, RFP and FChFP programmes.

Organized by

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