




Financial Perspectives
Centre for Professional Excellence in
Advisory Competency and Ethics

A photograph of four business professionals in an office setting. A man in a white shirt is leaning forward, looking at a woman in a blue top who is also looking at another woman in a white top. A woman in an orange top is in the foreground, looking towards the group.

Succession and Employee Benefits Planning


Course Prospectus
**SME Masterclass
Series**

A photograph of a woman with short brown hair, wearing a grey blazer over a white shirt, standing with her arms crossed and smiling.

Program Overview

Through a combination of case studies, discussions, collaborative learning and mini lectures, this Masterclass facilitates the understanding of succession and employee-benefits planning and use various applications of insurance products to address them.

This Masterclass constitutes one of the core modules to attaining the CREDIBILITY™ Business Continuity Specialist Designation.



Course Objectives

At the end of this Masterclass, participants will:

1. Understand the importance of succession planning and the consequence of not planning,
2. Understand the challenges of succession and how to address situations whereby the SME owner does not have a willing successor using a combination of insurance products and trust vehicles.
3. Understand the importance of talent retention and how employee benefits may be used.
4. Understand and apply the various forms of deferred compensation models to retain a key employee in a SME.



Total Training Hours

Upon completion of this program, participants will be awarded the Certificate of Completion and 4 non-core CPD Training Hours.



Who Should Attend?

Financial Planning Professionals,
Bank Relationship Managers
and Insurance Specialists,
Insurance Agents



Course Fee

\$350 before GST



Funding

This program is IBF-FTS recognised and is eligible for funding under the IBF-FTS scheme.

Enquiry and Enrolment



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