

The logo consists of the letters 'FP' in a bold, serif font, enclosed within a dark square.

Financial Perspectives
Centre for Professional Excellence in
Advisory Competency and Ethics

Course Prospectus

Retirement Planning Masterclass

Integrating Government Schemes and Living Documents into Retirement Planning

Module 2

Program Overview

Module 2 equips participants to integrate essential government schemes and services seamlessly into their clients' retirement plans. Explore topics like the Supplementary Retirement Scheme (SRS), Enhanced Lease Buyback, and Silver Housing Bonus Scheme.

Understand critical government-managed living documents—Advance Care Plan (ACP), Lasting Power of Attorney (LPA), Advanced Medical Directive (AMD), and Human Organ Transplant Act (HOTA)—and their applications. Learn to identify potential gaps within these schemes, offer tailored solutions, and develop impactful sales propositions for estate planning and distribution, solidifying your expertise in holistic retirement strategies.



Course Objectives

In Module 2, participants will have a good understanding of other government schemes and services offered and integrate them as part of their clients' retirement plan.

- a) Understand the Supplementary Retirement Scheme (SRS) and its drawbacks.
- b) Understand the Enhanced Lease Buyback and Silver Housing Bonus Scheme
- c) Understand the core living documents managed by the government and its applications:
 - a. Advance Care Plan (ACP)
 - b. Lasting Power of Attorney (LPA)
 - c. Advanced Medical Directive (AMD) and Human Organ Transplant Act (HOTA)
- d) Identify potential gaps these schemes might present different clients and provide suitable insurance and investment solutions to manage them.
- e) Develop sales propositions for estate planning and distribution.



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



enquiries@fp-edu.com



+65 8111 7890



www.fp-edu.com



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