

Certificate in Trust Services

Accredited by IBF
and Endorsed by STA

Up to 70% IBF Funding for Singaporeans
and Permanent Residents

Eligible for
32 SILE CPD Hours



Designed to meet the needs
of UNHW/ Family Offices

Wealth Management Institute
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Singapore 018989

Contact us at
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The Certificate in Trust Services (CTS) programme provides participants with a comprehensive overview of the wealth & estate planning industry in Singapore and the fundamental tools and solutions available to achieve their client's long-term financial succession and preservation objectives.

Designed for individuals who are interested to deepen their understanding of trust administration and wealth and estate planning, as well as individuals who are keen to pursue a career in these areas, the CTS programme is taught by highly qualified senior practitioners from the wealth and estate planning industry and covers topics including trust regulations and practices, taxation, client advisory and trust structuring, trust management and operations as well as risk management.

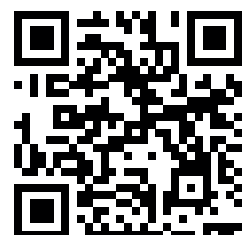
This is the first of a two-part course and is required prior to taking the Advanced Certificate in Trust Services programme.

Who should attend

- Trust Administrator/ Manager
- Wealth Planner
- Estate Planner
- Lawyer
- Family Office Advisor
- Client Advisor
- External/ Independent Asset Manager
- Financial Planner

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Programmes Offered



Trusts in Wealth Planning

This module provides a comprehensive overview of the wealth & estate planning industry. A good understanding of the features and characteristics of the wealth & estate planning tools and structures, applicable laws and regulations, are essential elements of a successful wealth planner. Lessons will be drawn from global industry trends and regulatory developments applied to daily work practices.



Trust Regulations and Practices

The international regulatory and compliance environment have been developing alongside the rapidly evolving industry. It is imperative for professionals in the industry to keep abreast of the latest legislative and regulatory requirements relevant to the industry, organisation, operational environment and individual roles. This module covers the emerging and changing regulatory and compliance frameworks governing estate planning and trustee services in Singapore.



Wealth and Estate Planning: Tax

This module provides an overview of global tax regimes and how they impact the administration of trust companies in Singapore. Fundamental taxation concepts like taxation of trust, domicile and residency will be discussed. Participants will gain broad perspectives of key tax concepts and the regulations relevant to wealth and estate planning.



Client Acceptance and Management

In this age of enhanced regulatory requirements, trust companies have to be aware of the various regulatory changes that impact the growth of the trust business. This module imparts the practical knowledge and skillsets required during the client acquisition and on-boarding process. This module also dives into the industry best practices to uncover service opportunities and develop client loyalty and confidence in the organisation.



Trust Administration

This module covers the principles and end-to-end processes involved in the administration, implementation and management of a trust. Participants will learn the relevant market laws and regulations as well as the industry best practices of organisation's policies and procedures. This includes accounting, compliance, and methods used in the implementation and periodic performance review of the trust assets. The trustee's fiduciary duty of care will also be discussed.



Trust Business Risk Management

This module provides an overview of the compliance, monitoring and control functions in a trust company. Critical risk areas and fiduciary duties involved in the various stages of tax operations will be highlighted. Anti-Money Laundering (AML) and Counter-Financing of Terrorism (CFT) will be covered. Case studies will be used to enhance the learner's understanding and application of risk knowledge.



Arriving at the Trust Decision

Wealth planners need to have a good understanding of a client's needs and objectives in order to provide sound advice and recommendations. This module prepares professionals to conduct meaningful evaluations of their clients' needs using financial as well as non-financial information. Through the extensive use of complex multi-jurisdictional case studies, participants will learn key considerations in trust structuring and understand the various types of structure options and capabilities.

Accreditation & Fee Breakdown

In addition to Course Fees, each participant will also be charged a non-refundable and non-claimable application fee of S\$85 (including GST).

Fees shown are after IBF-STF funding. Subsidised# fees apply upon participants' successful completion of the programme, which includes (i) fulfilling minimum attendance requirements and (ii) passing all relevant assessments.

Global-Asia Family Office Circle (GFO Circle) Members are entitled to 10% discount across "Trust Services" programmes.

Modules	Full Fees (S\$)		Fees after subsidies inclusive of 9% GST	
	Before GST	After GST	Singaporean Aged Below 40 / PR Company-Sponsored/ Self Sponsored	Singaporean Aged 40 & Above Company-Sponsored/ Self Sponsored
COURSE FEES	\$6,000	\$6,540	\$3,540	\$2,340