

Certificate in International Tax Considerations for Families of Wealth

Explore tax considerations in Singapore and globally

Up to 70% IBF Funding for Singaporeans and Permanent Residents

Contextualise tax developments in relation to Family Office



Next Session:
31 Aug & 1 Sep 2023

10 Core CPD Hours

Contact us at contact@wmi.edu.sg

With the increasing globalisation of Family Wealth, tax considerations are integral to ensure families comply with global tax conditions to preserve wealth.

This course explores in-depth tax considerations in Singapore and across the globe, allowing learners to understand how best to advise or practice tax compliance for family offices. It covers the broad overview of existing and emerging global tax issues and obligations, and how these may impact tax-related decisions of families today (e.g., FATCA/CRS) and discusses the challenges of families with large global footprints and common trigger points that may have tax impact.

At the end of the programme, participants will be able to:

- Structure investment and succession plans with a holistic view of the tax landscape
- Highlight relevant tax developments in relation to Family Office and the Family
- Analyse and contextualise these developments to the Family's situation and highlight where there may be a possible impact
- Make recommendations on possible tax implications referencing supporting information and sources

Who should attend

- Trust Administrator/ Manager
- Wealth Planner and Estate Planner
- Trust Relationship Managers
- Lawyer
- Family Office Advisor
- Client Advisor
- Client Relationship Managers handling UHNW and Family Office segment
- External/ Independent Asset Manager
- Financial Planner

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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.

This programme is currently pending IBF accreditation and may be subject to changes. The information above is correct at the time of publication. Wealth Management Institute reserves the right to amend the fees and/or terms and conditions as appropriate.

	Full Fees		Fees after IBF subsidy (inclusive of 8% GST)	
			Singaporeans Aged Below 40/ Permanent Residents (50% IBF-STF Funding)	Singaporeans Aged Above 40 (70% IBF-STF Funding)
	Before GST	After GST	Company & Self- Sponsored	Company & Self- Sponsored
<u>COURSE FEES</u>	<u>S\$2,250</u>	<u>S\$2,430</u>	<u>S\$1,305</u>	<u>S\$855</u>

Subsidies are subject to change by IBF and fees will be adjusted based on prevailing funding rates.