ISO 17024 Certified Online Class

CERTIFICATE OF COMPETENCY IN ESTATE PLANNING

Malaysia Will and Trust Association

Assessed and certified by:

THINK PLUS ACADEMY

ISO/IEC 17024:2012 Accredited Personnel Certification Body

mwta.org.my

About Us

THE MALAYSIA WILL AND TRUST ASSOCIATION (MWTA)

Since 2021, our mission has been to empower all Malaysians with a profound understanding of the importance of wills and trusts, fostering harmony within their families.

We firmly believe that education plays a pivotal role in realising this vision. Therefore, we are dedicated to enhancing the will and trust industry by setting exceptional standards and practices.

We invite you to join us on this transformative journey as we pioneer a new era of excellence, setting a remarkable precedent for the future.

ISO 17024 Certified | Certificate of Competency in Estate Planning

COURSE INFORMATION

The Certificate aims to provide recognition, as well as knowledge and skills in Estate Planning, essential for effectively planning and managing the distribution of client assets and properties upon their death or incapacity. This recognition will enhance your professionalism, enabling you to offer holistic Financial Planning services to your clients. The online course duration is approximately 20 hours.

This course is suitable for :

- Minimum age of 18, Malaysians only
- Estate Planners
- Insurance Advisors
- Private Bankers / Relationship Managers
- Accountants
- Licensed Financial Advisors / Private Retirement Schemes Advisors
- Licensed Unit Trust Advisors
- Anyone interested in becoming an Estate Planner with a minimum SPM qualification

WHY CHOOSE THIS COURSE:

1. **Gain a comprehensive understanding** of estate planning fundamentals, including personal laws, purposes, involved parties, and the process.

2. **Discover effective strategies** to safeguard and preserve your wealth, ensuring protection against potential risks.

3. **Learn about the legal requirements**, planning considerations, and steps involved in establishing wills and trusts.

4. **Understand the different** types and characteristics of trusts.

5. **Master the use** of various powers of attorney and grasp the rights and responsibilities of all parties involved.

6. **Gain insights** into the duties and powers of personal representatives and trustees.

7. **Understand the rights** of beneficiaries and the available remedies for them.

8. **Explore the challenges** faced by business owners in continuity planning, retirement, and disability.

COURSE CONTENT:

Module 1: Estate Planning Fundamentals

- Understanding Personal Law and Estate Planning
- Understanding Purposes and Objectives of Estate Planning
- Understanding Process and Strategies of Estate Planning

Module 2: Wills

- Definition and Purpose of a Will
- Types of Wills
- Planning Considerations in Will Writing

Module 3: Trust

- Characteristics and Components of a Trust
- Classification of Trusts
- Application in Financial Planning Criteria

Module 4: Power of Attorney

- Definitions and Characteristics
- Procedural Aspects
- Remedies Available to the Donor

COURSE CONTENT:

Module 5: Duties and Power of Personal Representatives

- Duties of a Personal Representative and Trustee
- Criteria for Personal Representative and Trustee

Module 6: Understanding the Rights of Beneficiaries

- Rights Granted to Beneficiaries

Module 7: Business Succession Planning in Estate Planning

- Types of Businesses
- Buy-Sell Concept for Addressing Business Continuity

Module 8: Charity Trust

- Definitions and Characteristics
- Procedural Aspects
- Charitable Organisations as Beneficiaries of Private Trusts

ENG COURSE TRAINER PROFILE:

How Lean Giap

LLB (Hons)

EDUCATION & CERTIFICATION

- Graduated from Northumbria University, Newcastle
- Founder and Managing Partner of Messrs How, Ong & Associates, legal firm

With 12 years of experience as a practising lawyer, How has specialised in areas such as conveyancing, probate and estate administration, civil litigation, and insurance claims. Before his admission as a lawyer, he gained valuable experience working in both a general insurance company and a trustee company.

In addition, How has served as a Legal Advisor for Easiwill, attained HRD Corp Certified Trainer status, and held the position of Past President within the BNI Arcadia Chapter.

CHI COURSE TRAINER PROFILE:

Simon Hii

Trainer, Facilitator & Host

EDUCATION & CERTIFICATION

- Registered Financial Planner
- (RFP) HRD Corp Certified
- Vice President of JCI BNI
- Creator of Moneysenz Cashflow Workshop

Simon is a highly experienced trainer and speaker with more than 3 years of experienced as a trainer and group facilitator. He works with groups, individuals, and organizations to inspire them to become better versions of themselves especially in the field of personal finance.

MWTA
Malaysia Will and Trust Association
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CONTACT INFORMATION:

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Disclaimer: The information in this marketing material is for general informational purposes only. For detailed terms and conditions of the Certificate of Competency in Estate Planning course, please refer to the official documentation provided by the Course Organiser. The Course Organiser reserves the right to modify or alter the course contents, curriculum, and materials as necessary to ensure the course runs at its best quality. Any changes made will be aimed at enhancing the learning experience and providing the most up-to-date information to participants. Participants will be duly informed of any significant modifications that may impact the course content. By enrolling in the course, participants acknowledge and accept this right of the Course Organiser to make appropriate improvements to the course.