Accredited by the Institute of Banking and Finance (IBF)

Top Trainers who are Veterans in their Fields

Wealth and Financial Planning Masterclass

Your Personal Finance Journey Begins Here

Course Overview

Wealth & Financial Planning Masterclass!

Are you ready to master your finances or elevate your career as a professional Wealth Planner? Our comprehensive 16-hour course is designed to provide you with a robust foundation in wealth planning.

Why Choose This Course?

- Expert-Led Training: Learn from seasoned industry veterans who bring real-world experience to the classroom.
- Comprehensive Curriculum: Master both the technical skills needed to create effective financial plans and the interpersonal skills to understand and meet clients' unique needs.
- Practical Insights: Gain actionable strategies and insights to help clients achieve their financial goals.

Whether you're looking to manage your personal finances more effectively or build a successful advisory career, this course is your gateway to success in the world of finance. Join us and take the first step towards a brighter financial future!

Course Highlight

Introduction to Wealth Building

Wealth Creation Formula: Uncover the key to building wealth and explore the phases of smart investing.

Wealth Planning Fundamentals

Master the Essentials: Develop confidence in managing personal wealth or starting a successful career in wealth management.

Build Trust: Foster deeper client relationships by understanding unique dynamics and building mutual trust.

Achieve Financial Independence: Escape the sandwich generation by planning for both immediate and future financial independence.

Set Financial Goals: Jumpstart your future by defining clear, actionable, and meaningful financial objectives.

Cash Flow & Budgeting: Gain control of your finances and discover hidden resources through effective planning.

Financial Risk Management: Identify common financial risks and discover simple and effective strategies to mitigate them.

Hands-On Financial Planning: Gain practical skills by crafting a personalized financial plan.

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Course Outline

Accredited by:

The Institute of Banking & Finance

1. Introduction to Wealth Building	• The Wealth Creation Formula • Financial Independence Model
2. Construct a Personal Financial Plan	• Processes to Construct a Personal Financial • Plan Goal Setting
3. Cash Flow Budgeting	• Money Mastery • Financial Documents Analysis • Analysis of Assets & liabilities, Income & Expenses, Cash-flow Budgeting etc
4. Risks and Risks Management	• Lifestyle Change Inflation Risk Temporary Loss • of Income • Permanent Loss of Income • Financial Instruments for Risk Management
5. Wealth Planning Strategies	• Investors' Profiling instead of Risk • Profiling Surplus Allocation • Concept of Best Return
6.Hands-on Crafting of a Financial Plan	• Case Studies

TRAINERS PROFILE

Esguerra Pamela M

I always strive to be better in my chosen field, especially in the area of personal and professional development.

A veteran in the finance industry with over a decade of experience in both individual and corporate environment. My key skills are in the area of analysis, financial planning, business development, training and leadership.

Mah Siew Heng

I always looking out for new knowledge to add to my personal library.

Experienced Business Leader with a demonstrated history of working in the financial services industry. Equipped with a strong development professional that is skilled in Negotiation, Retail and Sales.

Ng Wee Seng

My key skills and area of specialization include collaborative the team efficiency leadership and personal development, building strong and trusting relationships, following through an idea to execution with proven results.

A veteran in the financial industry with 1.5 decades of experiences in business development, leadership, investment advisory as well as financial planning.

Audience/Pre-requisites

Audience:

- Those looking to enter the finance industry as Personal Financial Advisors

- Anyone interested in the area of Personal Finance

Pre-requisites:

- Basic reading & writing skills

- Basic computer skills (know how to browse the Internet, operate Microsoft Excel, Zoom, etc.)

Training Provider

WEALTH
Design Studio

Wealth Design Studio is a learning platform where we encourage individuals from all walks of life to invest in themselves and their future.

This course has been accredited under the Skills Framework for Financial Services and is eligible for funding under the IBF Standard Training Scheme (IBF_STS), subject to all eligibility criteria being met.
Participants are advised to access the suitability of the course and its relevance to his/her business activities or a job roles.

The IBF-STS is available to eligible entitled and individuals based on the prevalent funding eligibility, quantum and caps. IBF-STS provides up to 70% course fee subsidy support for direct training costs subject to cap of $3,000 per candidate per course subject to all eligibility criteria being met.

FAQs

1. When do courses take place?
Classes take place over a period of 2 days. Check the Course Schedule for more information.

2. How are lessons conducted? Are there in-person lessons?
At this time, lessons are conducted at a physical classroom location. However, online lessons may be conducted at later date.

3. What is the maximum headcount per class?
Each class is capped at 24 pax

4. How long is the total course duration?
Total is 16 hours
(15 hours for training + 1 hour for Assessment).

5. What is the mode of the class?
Physical Classroom

Course Fees & Fundings

Full course fee $1,200.00

Individual Sponsored

Singaporeans Age 40 & Above	After 70% Course Fee Subsidies: $360.00
Singaporeans Age 21-39 & PRs	After 50% Course Fee Subsidies: $600.00

About IBF Certification and Funding

This course addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

- Personal Finance Advisory (proficiency level 3)

Participants are encouraged to access the IBF MySkills Portfolio (https://www.ibf.org.sg/home/for- individuals/resource-tools/myskills-portfolio) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role.

Find out more about IBF certification and the application process on https://www.ibf.org.sg/home/for-individuals/ibf-certification/why-be-ibf-certified

- Boiler plate on IBF-STS

This course has been accredited under the Skills Framework for Financial Services and is eligible for funding under the IBF Standards Training Scheme (IBF-STS), subject to all eligibility criteria being met. Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.

The IBF-STS is available to eligible entities and individuals based on the prevalent funding eligibility, quantum and caps. IBF-STS provides up to 70% course fee subsidy support for direct training costs subject to a cap of S3,000 per candidate per course subject to all eligibility criteria being met.

Find out more on www.ibf.org.sg