CERTIFICATE IN TRUST ADVISORY

Establishing a Strong Foundation for a Successful Career as a Trust Advisor.

MFPA
Malaysian Financial Planning & Advisor Institute

www.mfpa.my

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CERTIFICATE IN TRUST ADVISORY

This Certificate provides you with a recognition of having obtained the necessary knowledge and skills in trust advisory and in being able to formulate customised trust solutions to address your client's needs. Achieving this certification can certainly enhance your professionalism as you transit into the trust industry or when you wish to expand your client offerings to include trust services.

WHAT YOU WILL LEARN

01 Foundational knowledge in all aspects of trust features, benefits, regulations & practices.

02 The tools to identify, analyse and quantify clients' wealth needs.

03 The skills to formulate customised wealth solutions using trust.

WHO SHOULD ATTEND

- Accountants / Tax Consultants
- Lawyers / Insurance Advisors / Unit Trust
- Private Bankers / Relationship Managers
- Private Retirement Schemes Consultants
- Licensed Financial Advisors / Financial Planners
- Anyone serving the HNW private client segment

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CERTIFICATE IN COMPLETION

UTM
UNIVERSITI TEKNOLOGI MALAYSIA

Certification Body

01 Pre-Recorded

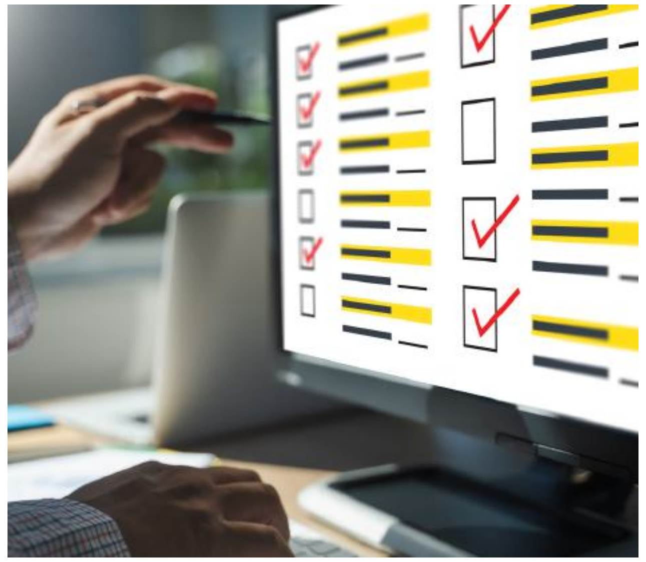
Video Tutorials & Assignments

02 Live

Online Webinar

03 Own Pace

Reading and Research



04 Examination

2-hour examination comprising 60 multiple-choice questions

Course Information

Duration :

23 hours

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COURSE DEVELOPER & FACILITATOR

Alan Chew CY

Alan is a highly accomplished expert trainer with over 15 years of experience, successfully equipping thousands of professionals in diverse fields such as banking, insurance, investment management, financial planning, accounting, and law. He has held prestigious in-house corporate training positions at renowned organisations including DCS Group of Companies, Hong Kong Fiduciary Association, Kenanga Investors Group, RHB Investment Management, and OSK-UOB Investment Management.

Alan's educational background features an accountancy degree from the Association of Chartered Certified Accountants (ACCA). He further bolstered his credentials with the Chartered Financial Consultant (ChFC) qualification from the Malaysian Insurance Institute. Additionally, he holds the RFP certification from the Malaysian Financial Planning Council and the esteemed CFP certification from the Financial Planning Association of Malaysia (FPAM).

By engaging in Alan's training courses, participants gain access to an unrivaled wealth of expertise and guidance from a highly respected professional. Discover your true potential and embark on a transformative journey toward becoming a distinctive trust advisor.

Course Modules

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

01 Legal Evolution & Basics of Trusts

- Understand the history & origins of trusts
- Explain the trust structure & equitable obligations of the trustee
- Compare between using a corporate trustee vs an individual trustee

02 Essentials of a Valid Trust

- Identify the 3 certainties of a valid trust
- Examine a settlor's capacity to transfer assets into a trust
- Distinguish the reserved powers of settlor according to common law & modern legislation
- Navigate the proforma of a trust instrument

Course Modules

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

03 Trusts as a Vital Component in Wealth Management

- Distinguish between financial planning & wealth management
- Categorise potential clients of wealth management
- Identify the providers of wealth management & their offerings
- Understand the role of trusts in an individual client's wealth matters

04 Estate Planning for HNW Individuals

- Understand the legal & financial consequences upon one's death
- Identify the components of a total estate planning solution
- Apply different tools to create a holistic estate plan

Course Modules

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

05 The Trust Advisory Cycle

- Navigate the 6 stages of the Trust Advisory Cycle
- Identify client's personality and building a lasting client-advisor relationship
- Obtain & record client's financial & non-financial information
- Apply various techniques and tools at each stage of the cycle

06 Developing & Customising Trust Solutions

- Analyse client's personal information & formulating various options using trusts
- Understand the different types of trusts available
- Plan for business succession of the family business

Course Modules

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

07 Exploring Legislations Having an Impact on Trusts

- Distinguish between common law (trust) & civil law (non-trust) jurisdictions
- Grasp the salient points of typical onshore legislation: The Malaysian trust laws
- Compare the salient points of offshore Labuan trust laws with onshore trust laws
- Apply anti-money laundering & anti-terrorism financing to trust practices

08 Launching Your Career as a Trust Advisor

- Capture opportunities in financial services using trusts
- Begin with the end in mind: for yourself & for your client
- Distinguish yourself from the competition
- Market your trust services to high-net-worth clients with confidence

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Connect With Us!

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