SMART WILLS®

Riverside Training



Certified SmartPlanner Singapore (CSPS)

SECURE LEGACIES, BUILD FUTURES

Your smartest & fastest online will & trust writer



Certified SmartPlanner - Singapore (CSP-SG)

Course Duration 2 Days (6 hours training per day)

Schedule 9.30am-4.30pm (12pm-1pm Lunch Break)

Class Modes Online Zoom

Course Fee SGD 388

Class Size 20 pax

Bundled with 1 PRO Will & Testamentary Package, including Corporate Trustee Appointment and Premium Printing — valued at S$495

By the end of this course, participants will:

1. **Gain Practical, Hands-on Experience**
– Apply estate and trust planning strategies through case studies and real-world scenarios.

2. **Enhance Wealth Protection & Succession Planning**
– Master advanced techniques to secure and distribute wealth efficiently.

3. **Leverage FinTech Innovations in Estate Planning**
– Learn how technology enhances estate management, from digital Wills to Will execution, and explore strategies for expanding your estate planning business globally.

Module 1	Module 2	Module 3
Practical Will Planning	Practical Trust Planning	Leveraging FinTech Innovations in Estate Planning

Module 1: Practical Will Planning

This course covers :

1. **WILLS** – Singapore Wills for locals and foreigners.

2. **LPA FORM 1 & 2** – Use Form 1 for basic situations. Use Form 2 to customise your wishes, such as for business owners or those with special needs.

3. **Professional Doneeship** – Appoint independent parties to act as your donee if you lose mental capacity.

4. **Professional Deputyship** – Appoint independent parties to act as your deputy if you have lost mental capacity.

Module 2: Practical Trust Planning

This course covers :

1. **COMMONLY USED BY SINGAPORE FAMILIES**
   Testamentary Trusts, Standby Trusts and Insurance Trusts.

2. **COMMONLY USED BY HNW & FOREIGNERS**
   Active Trusts, Private Trust Companies.

3. **COMMONLY USED BY UHNW & FAMILY BUSINESSES**
   Family Offices.

Module 3: Leveraging FinTech Innovations in Estate Planning

This course covers :

1. **Digital Wills and Trust Solutions**
A streamlined process for creating Wills and Trusts, offering quick client responses and efficient management of your estate planning practice.

2. **Digital Will Execution**
Simplifying access to legal advice and essential documentation, facilitating the application for Grants of Probate, Letters of Administration, Lasting Power of Attorney (LPA), and other necessary legal processes—all within a single platform.

3. **Leveraging Time in Your Business**
Streamline your estate planning workflow so you can focus on your core business activities and maximise business growth and potential.

4. **Building a Career in Cross-Border Estate Planning**
Guiding you in tapping into cross-border opportunities while effectively managing client expectations across different jurisdictions.

Trainer Profile

MR KEON CHEE

Founder & Executive Director of Riverside Trustees

Keon's career spans 30 years, the past 20 of which have been in finance, estate planning and trust services. He is the author of *Planning Your Will, Trust, LPA and More* in which he collaborated with over 30 practitioners from over 12 countries. He is often sought by the local media for his views on estate planning.





MS OOI LI SUN

Director, Wills & Estates, Riverside Planning Services

Li Sun has vast experience in estate planning. She has handled or overseen over 400 estate and trust cases. She chambered under Messrs Adnan, Sundra and Low and was admitted as an Advocate and Solicitor in the High Court of Malaya then joined Rockwills Singapore (now known as PreceptsGroup) and led their Will, Custody and Estate Administration team in 2014 until mid-2024 when she joined Riverside. She's written over 3,000 wills and testamentary trusts for Malaysians, Singaporeans and foreigners.

MS LOW SEOW LING *(Lawyer -Guest Speaker)*

Founder & MD of Emre Legal LLC

Seow Ling specialises in sustainable estate planning for singles, families with special needs, and the elderly. Appointed in the first batch of professionals under the Professional Deputy and Donee scheme in 2018, she is dedicated to supporting individuals without family to act as their proxy decision-maker. With experience in contested estates, mental capacity, divorce, and child custody matters, she brings a deep understanding of sensitive family issues. As an accredited mediator, she advocates for amicable, sustainable resolutions through communication and interest-based negotiation. Fluent in Mandarin, Seow Ling regularly shares her expertise with organisations such as SPED schools, MOM, CPF Board, and SNTC.





MS JENNY TAN

Client Services Director, Riverside Trustees Limited

Jenny holds a Bachelor of Law Degree (LLB) from the University of Birmingham and a Bachelor of Business in Banking and Finance (BBA) from Monash University. She is a member of STEP and has attained the Advance Certificate in Trust Services with the Wealth Management Institute. She has accumulated vast experiences in structuring different types of trusts for banking clients since her banking days as a Private Banker.

With more than 10 years of experience as a trust manager, and 16 years as a wealth manager, she excels in delivering superior results by providing expert guidance on trust administration, estate planning, compliance and investment management.

MS MINDY LIM

SmartWills Singapore Certified Trainer

Mindy Lim brings 11 years of experience in the financial industry and is an Associate Specialist in Estate Planning (ASEP). She specializes in family financial planning, offering comprehensive solutions that span from protection to wealth distribution, ensuring her clients are well-prepared for every stage of life.



Primary Training Providers :

Riverside Training

SMART WILLS

Riverside Training Pte Ltd is part of the Riverside Group of companies that includes:

- Riverside Trustees Limited (a Singapore Licensed Trust Company)
- Riverside Planning Services Pte Ltd (Wills & Estate Administration)
- Riverside Corporate Services Pte Ltd (Corporate Secretarial, Accounting & Tax)

Hotline
+65 89129929

Customer Service
+65 89139929

Sales
+65 89159929
Whatsapp (Chat Only)

Quick registration
Scan the QR code.

www.smartwills.com.sg

