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SalmonThrust

CLICK HERE TO REGISTER ONLINE

DECIPHER FAMILY OFFICE

CODE P200106WOR
VALIDITY PERIOD 30 Jan 2020 – 29 Jan 2022

TRAINING FOCUS Non-RRCE (4 hrs)

6 APR 2021 | ½ DAY | 1PM - 5.30PM | 4 CPD HOURS

As Asian wealth grows through accumulation over time there is an increasing number of families consolidating their wealth in Singapore through formal structures, such as family offices.

This 4 hours course is to enable you to understand what is family office, what roles and responsibilities are entailed by the family office, how is it set-up as well highlighting the areas of work that the family office carries out.

½ DAY | 4 CPD HOURS

RECOMMENDED FOR
PRIVATE BANKING & WEALTH MANAGEMENT

WHO SHOULD ATTEND

- Private Bankers
- Priority Bankers

COURSE OBJECTIVES

- Learn the concept and framework of family office
- Understand the role and responsibilities entailed by the family office
- Gain an overall awareness of Family Office in terms of its set-up and ongoing activities carried out by the Family Office

COURSE OUTLINE

- What is a Family Office
- What is a Single-Family Office
- What is a Multi-Family Office
- What is a Family Office set-up
- Products & Services offered by Family Offices
- Process and Procedures in a Family Office in relation to Selection of Fund Manager
- Areas to Consider before deciding to set up a Family Office:
  - – What are your objectives for setting up a family office?
  - – What assets to be held in & by the family office?
  - – What is the investment strategy and mandate for the family office?
  - – How to apply to MAS for licensing and tax exemption?
  - – What are the ongoing operational requirements?
  - – What is the business succession planning of family office?
  - – Is there any charitable/philanthropic organizations that the Family would like to support?

ABOUT OUR TRAINER

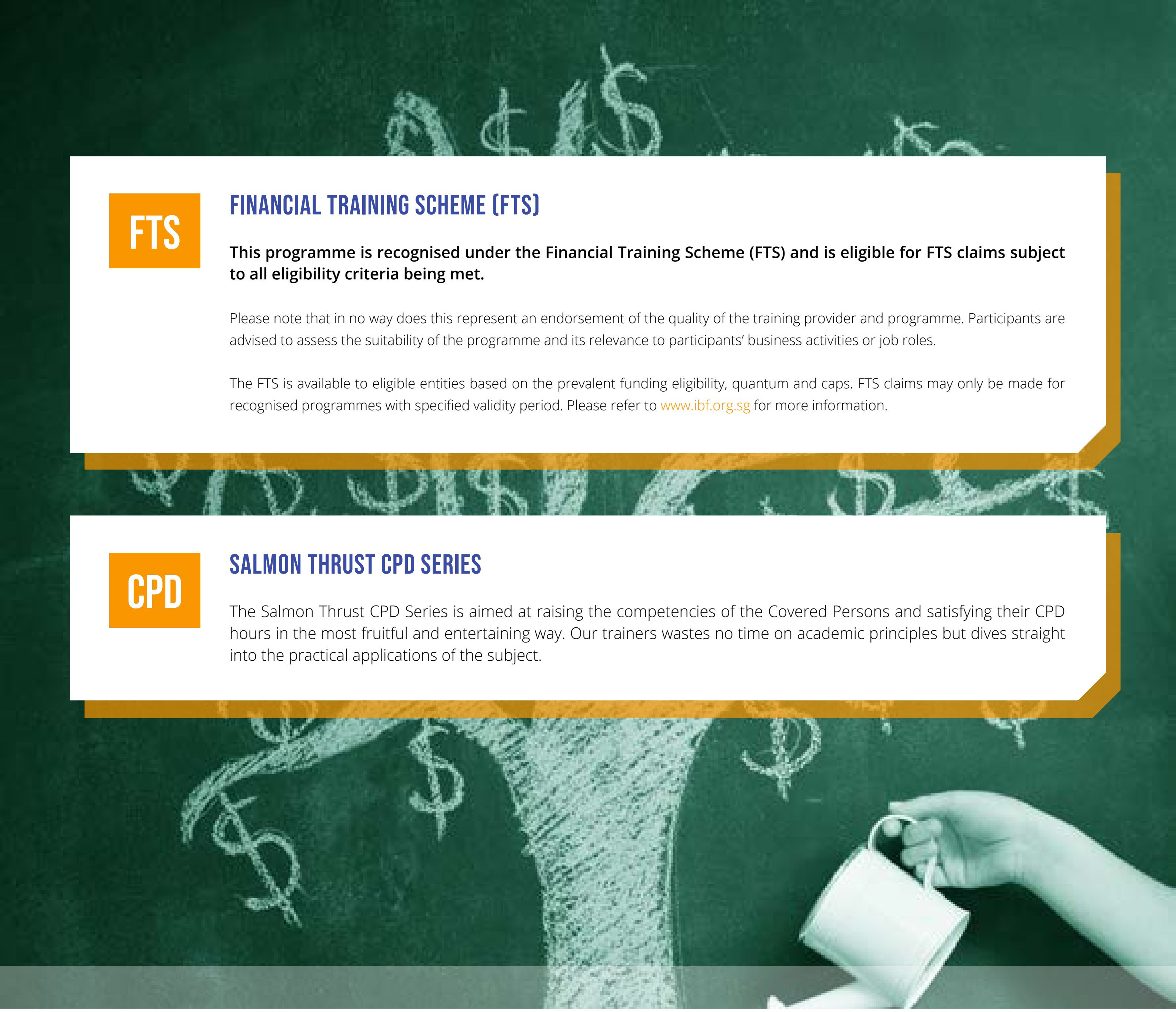
JUDY ANG TEP, B SOC SCI (HON), B.A. (MERIT) NUS

Judy is a qualified Trust & Estate Practitioner with more than 10 years of Trust and Fiduciary experience having worked with Independent Trust Company, Fiduciary Company and bank-backed Trustees. She has assisted many Asian families to set-up Trusts and other structures for wealth creation and wealth preservation.

Judy runs her own advisory firm to provide multi-family office support and services for high net worth clients in Asia. Judy is currently also a Trust Consultant with Dacheng Wong Alliance (DCWA), a Joint-Venture law firm between Dacheng, the largest law firm in China and Wong Alliance-a Singapore-based law firm. On 28 Jan 2015, it has merged with US-Law Firm: Dentons to become the world largest law firm with more than 6,500 lawyers.

Prior to running her own advisory firm, Judy was the Head of International Trust for CTBC Private Bank, Singapore. Her previous roles in the industry includes Associate Director, Wealth Planning at LGT Bank (Singapore) Ltd, Assistant Director at EFG Trust Company (Singapore) now known as EFG Wealth Solutions, Resident Manager for EFG Trust Company at the inception of the Trust Company. She started her career with Heritage Fiduciary Services Pte Ltd and the world's largest independent trust company-Equity Trust respectively.

Judy is fluent in written and spoken English and Mandarin.



FINANCIAL TRAINING SCHEME (FTS)

FTS

This programme is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met.

Please note that in no way does this represent an endorsement of the quality of the training provider and programme. Participants are advised to assess the suitability of the programme and its relevance to participants' business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS claims may only be made for recognised programmes with specified validity period. Please refer to www.ibf.org.sg for more information.

SALMON THRUST CPD SERIES

CPD

The Salmon Thrust CPD Series is aimed at raising the competencies of the Covered Persons and satisfying their CPD hours in the most fruitful and entertaining way. Our trainers wastes no time on academic principles but dives straight into the practical applications of the subject.

ABOUT SALMON THRUST

Founded in 2004, Salmon Thrust is committed to delivering real-world banking and financial training to professionals working in banks, corporates, government agencies, and other financial institutions.

Based in Singapore, we offer our clients in the region a broad range of up-to-date financial topics, delivered via classroom training and e-learning. Our courses range from foundational programmes for new entrants, right through to the most complex and current topics in the industry.

At Salmon Thrust, we are attentive to our clients' diverse learning needs. We identify relevant courses to bridge the learning and skill gaps, empowering our clients to make better decisions and bring real value to both their customers and organisations.