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TAX FACTORS FOR HNWIS

CODE P191209QGE

VALIDITY PERIOD 7 Feb 2020 – 6 Feb 2022

TRAINING FOCUS Regulatory/Compliance Training (4 hrs)

14 OCT 2021 | ½ DAY | 1PM - 5.30PM | 4 CPD HOURS

This half a day course provides a perspective of how wealth management is about protecting, growing and stewarding personal wealth into future generations of the individual's family and the tax impact on the various strategies and vehicles that are often used by high net worth or ultra high net worth individuals to effectively preserve and enhance their wealth.

WHO SHOULD ATTEND

- Private Bankers
- Relationship Managers
- Wealth Advisers
- Client on-boarding Specialists

1 DAY | 4 CPD HOURS

RECOMMENDED FOR

**PRIVATE BANKING &
WEALTH MANAGEMENT**

COURSE OBJECTIVES

- Introduce and highlight some of the common tax issues faced in wealth management
- Understand the tax factors that affect high net worth and ultra-high net worth individuals at length on
- Be aware of the various wealth preservation strategies and its' tax impact
- Be updated on global tax environment

COURSE OUTLINE

Introduction

- Common tax issues faced in wealth management industry

Tax Factors that affect individuals

- The 3 main tax considerations - Domicile, Nationality and Residence
- The tests for Residence with case studies support
- Other tax considerations and commissions made under OECD recommendations and tax authorities

Strategies and Vehicles adopted for wealth preservation and management

- Introduction of the various approaches to wealth management planning
- Tax considerations and impact on the various approaches and strategies
- Case studies support

Global Tax Environment

- Highlights of current global tax development
- Tax issues relating to OECD BEPS development and CRS
- The exchange of information and tax transparency issues

ABOUT OUR TRAINER

KHYRON GOH CA, FCCA, SIATP

Khyron Goh (Kai) is the co-founder of Kaiden Group. He heads the Tax and Anti-Money Laundering cum Counter-Financing of Terrorism (AML/CFT) compliance department. He specializes in tax advisory for Singapore, the high net-worth individuals and regional taxation in the Asia Pacific region as well as offshore tax planning. He also advises on the AML/CFT and CRS compliance for clients.

He started out as an Auditor at Ernst and Young before he joined a Trust Company as part of a senior management team where he headed three areas for high net worth clients in Accounting, Tax and Compliance. During his tenure, he developed a holistic range of accounting and tax services, to cater to his clients' needs. Together with his team, they prepared financial statements in accordance to the FRS standards and provides tax advice for his clients.

Kai has a passion for education and has more than 15 years of experience in imparting knowledge in the areas of tax and compliance. His previous teaching experience includes lecturing the CAT and ACCA programs. He specializes in taxation. He has lectured UK tax for the University of Bedfordshire, Singapore Taxation (F6). He has also taught the CAT papers 1-6, and Accountant in Business (F1). Some of his students were even prizewinners. Khyron was also previously a lead lecturer at SAISCA (The Singapore Association of the Institute of Chartered Secretaries and Administrators), teaching Singapore Taxation for its ISCA Professional Qualification. Currently, Kai is a very much sought after speaker by many private banks and various other institutions. Being an actual practitioner, he is able to utilize up-to-date actual case studies in his delivery to his audience. He holds a degree in Applied Accounting, diploma in Anti-Money Laundering from the Institute of Compliance Association International (ICA) and Accredited Tax Advisor qualification with the Singapore Tax academy (SIATP). Kai is also a Chartered Accountant of Singapore (CA), Chartered Accountant of ASEAN (ASEAN CPA) and a fellow member (FCCA) for the Association of Chartered Certified Accountants (ACCA).

FTS

FINANCIAL TRAINING SCHEME (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.

CPD

SALMON THRUST CPD SERIES

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.