

Estate Planning Training for Professional Estate Planners (BEPM1)



HTHT ADVISORY SERVICES PTE LTD

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Estate Planning Training for Professional Estate Planners (BEPM1)

To create a pre-qualified new profession in Estate servicing in the financial industry.

Course title

Pre-Certificate in Estate Planning for Muslims (BEPM1)

Synopsis

This course is designed to introduce the real life challenges faced by Muslims in Singapore in estate matters. Real life experiences will be shared in this program. Participants will have the opportunity to understand and appreciate the Civil Law and Shariah. Basic concept and practical solutions will also be discussed in this program. This program will prepare the participants to move a step further towards attending the Certificate in Estate Planning for Muslims.

Objectives

- 1 To give an insight into estate issues faced by the community in Singapore in estate matters.
- 2 To create a better understanding of the process in wealth/estate disposal.
- 3 To qualify participants to attend the Certificate in Estate Planning for Muslims (BEPM2).

Structure

- 2 modules per day
- 3 days program
- 3 hours per module
- 18 hours
- 2 hours Assessment through MCQ

Topics

Certification Course in Estate Planning for Muslims

BEPM1

1 Issues faced when a Muslim dies intestate	3 hrs
2 Probate Process	3 hrs
3 Statutory Disposition	3 hrs
4 Faraid I (Intestate Succession for Muslims)	3 hrs
5 Insurance	3 hrs
6 Approaching the Muslim market through E P	3 hrs
Total	18 hrs

Entry Qualification of BEPM1

Minimum Diploma

Age above 21

Cost

BEPM1 - \$ 1050 /- (3 Days)

Award

Pre-Certificate in Estate Planning for Muslims from HTHT
Advisory Services Pte Ltd

Trainer

Sadali Rasban

CWM (AAFM), MBA (Vancouver University), Diploma
in Syariah (UKM), Diploma in Islamic Banking & Finance
(IIUM), Writer of books on Syariah Law in estate matters

Modules in more details on BEPM1

Issues faced when a Muslim dies intestate 3 hrs

- Probate matters
- Fatwa
- Muslim Law in Estate matters
- Objectives of Estate Planning in Muslim Law

Probate Process 3 hrs

- Domicile matters
- Getting court order
- Distribution based on Muslim Law
- Public Trustee Roles

Statutory Disposition 3 hrs

- Joint Tenancy matters
- CPF money
- Insurance policies
- Cooperative monies

Faraid 1 (Intestate Succession for Muslims) 3 hrs

- Principles
- Objectives,
- Sources of the law,

Insurance 3 hrs

- Understand Insurance from Islamic perspective
- Understand the acceptance and rejections of insurance
- Insurance in Estate Planning

Approaching the Muslim market through E P 3 hrs

- How to initiate the discussion of E P amongst friends / relatives
- Answering rejection on E P
- How to have your services bought by the client

About the Trainer

Sadali Rasban is the author of a series of books on Estate matters. His books are currently being used by Financial Advisors and training institutes in Singapore and Malaysia.

An outstanding professional, he specialises in the use of financial tools in Personal Wealth Management, Estate Planning and Zakat Planning. He has shared his knowledge and marketing skills with financial advisers in Singapore and Malaysia.

He holds a Diploma in Islamic Law from Universiti Kebangsaan Malaysia (UKM), a diploma in Islamic Banking and Finance from International Islamic University of Malaysia (IIUM), a Diploma in Insurance and Financial Planning from the Singapore College of Insurance (SCI), the FChFP designation conferred by the Insurance and Financial Practitioner Association of Singapore (IFPAS), IFP (Islamic Financial Planner) designation conferred by IBFIM/FPAM (Islamic Banking & Finance Institute of Malaysia / Financial Planning Association of Malaysia) and a Master (with distinction) in Business Administration (Financial Services) conferred by Canada's Vancouver University as well as the Chartered Wealth Manager designation from the American Academy of Financial Management (AAFMM). He is currently a candidate for CIFP (Chartered Islamic Financial Planner) conducted by INCEIF.

About HTHT Advisory Services Pte Ltd

HTHT specializes in the areas of Personal Wealth Management, Estate Planning and Zakat Planning and is the pioneer in those areas in Singapore. HTHT engages in the challenging task of introducing innovative ideas and tools to the Muslim community to better serve them in planning for their wealth, their family, their future and their hereafter in accordance with the Shari'ah law. HTHT conducts training, consultancy and counseling services in estate matter.

HTHT provides wealth / estate transfer services for properties in Singapore & Malaysia. The services are as follows:

- Estate Planning for Muslims in Singapore & Malaysia
- Making of Will (Wasiat) / Hibah / Iqrar / Trust / Etc
- For Family & Family Business
- Getting Court Orders (Letter of Administration / Probate)
- Distribution
- Counseling
- Providing expert evidence, witness & affidavit for court cases
- Advice to lawyers on Muslim Estate matters in Court Cases
- Continuous research

Certification Course in Estate Planning for Muslims

Estate Planning Training for Professional Estate Planners (BEPM2)



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Estate Planning Training for Professional Estate Planners (BEPM2)

To create a fully qualified new profession in estate servicing in the financial industry.

Course title:

Certificate in Estate Planning for Muslims (BEPM2)

Synopsis

This course is designed to further develop the graduates of BEPM1. They will better understand the Shariah and will be able to appreciate the universal values of Shariah in the Civil Law. Participants will be able to understand the basic concept and practical application of the mechanisms in wealth / estate transfer in Shariah and the Civil system.

This program will qualify the participants to be an Estate Planner to serve Muslims in estate matters, Estate Planning and Estate Distribution.

Objectives:

- 1 To enhance graduates from the Pre-Certificate in Estate Planning for Muslims (BEPM1)
- 2 To give an in-depth understanding of the mechanisms of wealth / estate transfer in the Shariah.
- 3 To create opportunity for participants to be a competent advisor to provide better wealth / estate transfer services.

Structure

Certification Course in Estate Planning for Muslims

- 2 modules per day
- 4 days program
- 3 hours per module
- 24 hours
- 2 hours Assessment through MCQ and 2 case studies

Trainer

Sadali Rasban

CWM (AAFM), MBA (Vancouver University), Diploma in Syariah (UKM), Diploma in Islamic Banking & Finance (IIUM), Writer of books on Syariah Law in estate matters

Certification Course in Estate Planning for Muslims

BEPM2

1 Faraid II (Intestate Succession for Muslims)	3 hrs
2 Muslim Will (Wasiyyah)	3 hrs
3 Islamic Gift (Hibah)	3 hrs
4 Harta Sepencarian (Jointly Acquired property)	3 hrs
5 Trust (Amanah)	3 hrs
6 Estate Distribution	3 hrs
7 Zakat	3 hrs
8 Integration / Holistic services through PWMM™	3 hrs
Total	24 hrs
TOTAL	42 HRS

Entry Qualification of BEPM2

Certificate in BEPM1

Age above 21

Cost

BEPM2 - \$ 2000 /- (4 Days)

Award

Certificate in Estate Planning for Muslims from
HTHT Advisory Services Pte Ltd

Modules in more details on BEPM2

Faraid 11 (Intestate Succession for Muslims) 3 hrs

- Special cases
- Limitations and
- Responsibility
- Application (software),

Muslim Will (Wasiyyah) 3 hrs

- Principles
- Objectives,
- Limitations and
- Responsibility

Islamic Gift (Hibah) 3 hrs

- Principles
- Objectives,
- Limitations and
- Responsibility

Harta Sepencarian (Jointly Acquired property) 3 hrs

- Principles
- Objectives,
- Limitations and
- Responsibility

Trust (Amanah) 3 hrs

- Principles
- Objectives,
- Limitations and
- Responsibility
- Civil Trust

Estate Distribution 3 hrs

Certification Course in Estate Planning for Muslims

- Understand the wealth / estate created upon death
- Identifying the means for each wealth / estate created
- Process of estate distribution
- Consequences of enforcing the Fatwa

Zakat

3 hrs

- Understand the Zakat concept
- Beauty of Zakat
- Zakat in Estate matter

Integration / Holistic services through PWMM™

3 hrs

- Understand Personal Wealth Management for Muslims™
- The need for holistic approach in Wealth Management
- Prioritise the needs

About the Trainer

Sadali Rasban is the author of a series of books on Estate matters. His books are currently being used by Financial Advisors and training institutes in Singapore and Malaysia.

An outstanding professional, he specialises in the use of financial tools in Personal Wealth Management, Estate Planning and Zakat Planning. He has shared his knowledge and marketing skills with financial advisers in Singapore and Malaysia.

He holds a Diploma in Islamic Law from Universiti Kebangsaan Malaysia (UKM), a diploma in Islamic Banking and Finance from International Islamic University of Malaysia (IIUM), a Diploma in Insurance and Financial Planning from the Singapore College of Insurance (SCI), the FChFP designation conferred by the Insurance and Financial Practitioner Association of Singapore (IFPAS), IFP (Islamic Financial Planner) designation conferred by IBFIM/FPAM (Islamic Banking & Finance Institute of Malaysia / Financial Planning Association of Malaysia) and a Master (with distinction) in Business Administration (Financial Services) conferred by Canada's Vancouver University as well as the Chartered Wealth Manager designation from the American Academy of Financial Management (AAFPM). He is currently a candidate for CIFP (Chartered Islamic Financial Planner) conducted by INCEIF.

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- For Family & Family Business
- Getting Court Orders (Letter of Administration / Probate)
- Distribution
- Counseling
- Providing expert evidence, witness & affidavit for court cases
- Advice to lawyers on Muslim Estate matters in Court Cases
- Continuous research

Certification Course in Estate Planning for Muslims

Basic Course in Estate Planning for Muslims (BCEPM)



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Course title

Basic Course in Estate Planning for Muslims (BCEPM)

Synopsis

This course is designed to introduce the real life challenges faced by Muslims in Singapore in estate matters. Real life experiences will be shared in this program. Participants will have the opportunity to understand and appreciate the Civil Law and Shariah. Basic concept and practical solutions will also be discussed in this program. This program is to prepare the participants to be able to approach and promote to Muslims on Wealth/Estate Transfer matters.

Objectives

- 1 To give an insight on estate issues faced by the community in Singapore in estate matters
- 2 To create a better understanding of the process in estate disposal
- 3 To understand the mechanisms in wealth/estate transfer.

Structure

- 2 modules per day
- 4 days program
- 3 hours per module
- 24 hours
- 2 hours Assessment through MCQ

Topics

Certification Course in Estate Planning for Muslims

BCEPM

1. Issues faced when a Muslim dies intestate	3 hrs
2. Statutory Disposition	3 hrs
3. Faraid 1 (Intestate Succession for Muslims)	3 hrs
4. Insurance	3 hrs
5. Approaching the Muslim market through E P	3 hrs
6. Muslim Will (Wasiyyah) & Harta Sepencarian (Jointly Acquired property)	3 hrs
7. Islamic Gift (Hibah) & Trust (Amanah)	3 hrs
8. Zakat	3 hrs
Total	24 hrs

Entry Qualification of BCEPM

4 Credits in GCE 'O' levels

Age above 21

Cost

BCEPM1 - \$ 1500 /- (4 Days)

Award

Basic Course in Estate Planning for Muslims

RockWills / HTHT

Trainer

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Modules in more details on BCEPM

Issues faced when a Muslim dies intestate 3 hrs

- Probate matters
- Fatwa
- Muslim Law in Estate matters
- Objectives of Estate Planning in Muslim Law

Statutory Disposition 3 hrs

- Joint Tenancy matters
- CPF money
- Insurance policies
- Cooperative monies

Faraid 1 (Intestate Succession for Muslims) 3 hrs

- Principles
- Objectives,
- Sources of the law,

Insurance 3 hrs

- Understand Insurance from Islamic perspective
- Understand the acceptance and rejections of insurance by some scholars
- Insurance in Estate Planning

Approaching the Muslim market through E P 3 hrs

- How to initiate the discussion of E P amongst friends / relatives
- Answering rejection on E P
- How to have your services bought by the client

Certification Course in Estate Planning for Muslims

**Muslim Will (Wasiyyah) & Harta Sepencarian
(Jointly Acquired property)**

3 hrs

- Principles
- Objectives,
- Limitations and
- Responsibility

Islamic Gift (Hibah) & Trust (Amanah)

3 hrs

- Principles
- Objectives,
- Limitations and
- Responsibility

Zakat

3 hrs

- Understand the Zakat concept
- Beauty of Zakat
- Zakat in Estate matter

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Skill Components

Occupational Skills

Skills to educate clients about challenges faced when one dies intestate. Motivational skills will be incorporated so that the EP can confidently advise and service the clients.

Industry Skills

Able to advise clients on the different means of wealth / estate transfer pertaining to assets like, insurance, savings account, CPF, etc.

Employability Skills

Communication skills in approaching, motivating, selling and servicing the clients will be imparted.

Source of Income

Commission from estate planning service rendered.