ACCREDITED CERTIFICATION PROGRAM

The Associate Estate Planning Practitioner

AEPP®

Equipping financial professionals with estate and succession planning knowledge

TRAINER

Kimmis Pun

Wealth Management and Succession Planning Veteran

WHO SHOULD ATTEND

- Financial planners
- Wealth planners
- Family office professionals

ONLINE

6 hours Pre-recorded training videos	6 hours Live Webinar

How to Apply | http://www.ifphk.org/CEP/ce-calendar

EPPL Estate Planning Practitioners Limited

The Society of Will Writers

IN PARTNERSHIP WITH

IFPHK 香港財務策劃師學會 INSTITUTE OF FINANCIAL PLANNERS OF HONG KONG

AEPP® Certification Program
HONG KONG

Highlights

This course is an accredited certification program and aims to equip financial professionals with essential succession and estate/legacy planning knowledge and focuses on the practical application of a holistic approach in the wealth accumulation, preservation, and transition for the mass affluent and the high-net-worth individuals.

The financial professionals will find themselves well positioned to add value to the high-net-worth clients who are seeking an array of expertise to address their high-priority concern of passing down wealth.

Curriculum

Topic 1: Family Inheritance
Topic 2: Basic and Process of Wealth Planning
Topic 3: Family Business
Topic 4: Family Wealth
Topic 5: Family Members
Topic 6: Dynamic Solutions of Wealth Planning

Program Structure

Duration
12 training hours

The course is delivered on an online mode, with a hybrid format consisting of 6 hours of pre-recorded videos accessible via FPLearning and 6 hours of live Webinar.

Language
Cantonese, supplemented with English

Assessment
End-of-course written assessment

About the trainer

Kimmis Pun
MBA, CFP, ChFC, CWMA, AIF, AEPP® and IBFA

Kimmis has over 30 years of extensive experience in investment management, banking, wealth and succession planning . She has held senior management positions in various leading global banks, including UBS, HSBC, BNP Paribas, Bank of America and Standard Chartered, serving Ultra High Net Worth Individuals in Indonesia, Singapore, Malaysia, Middle-East and the Greater China Region.

Kimmis is the Chairman of Wealth Planning Standard Board. She has also played a signifcant role in the financial planning industry. She was on the Board of Directors of US-based Financial Planning Standard Board after her 4-year presidency in Financial Planning Association of Singapore.
Currently, Kimmis is the Managing Director, Family Office, in Shenning Investments Pte Ltd (MAS-licensed fund manager).

She is a frequent speaker at global conferences and workshops and has accumulated over 15 years of experience as a lecturer in universities in Singapore and the Asia region.

About the AEPP® designation

To date, there are over 6,500 AEPP® designees in Singapore, Malaysia and Indonesia. The AEPP® designation can be added to your professional credentials and the directory of designees is searchable online.

The Institute of Financial Planners of Hong Kong is the exclusive education provider partner for the AEPP® certification program in Hong Kong.

Certification and Eligibility

The accreditation of the AEPP® designation is awarded by Society of Will Writers (SWW) of the United Kingdom and Estate Planning Practitioners Limited Singapore.

To be granted the Certificate of Award for the AEPP® designation, 100% attendance rate and a pass in the end-of-course written assessment, as well as an approved AEPP® designee application are required.

CE recognitions

This course is eligible for CE recognitions. Participants can earn 12 IFPHK CE/ SFC CPT / MPFA (Non-Core) CPD hours upon course completion.