

WILLS BOOT CAMP 2012

10 January 2012 (Tuesday) • 2.00 - 5.00pm • FTSE Room, Capital Tower, 168 Robinson Road

About this Training Course

With the will, you get to understand the financial objectives of your clients better. It gives you the opportunity to draw up financial plans that match your client's legacies and provisions for his family members.

The ½ day Wills boot camp training focuses on the law and practical aspects of wills, the formalities, dealing with intestacy and the issues that are involved in administering an intestate's estate. The speaker will highlight the advantages of having a will in place, custody and will making for the foreign-domiciled person. He will discuss aspects and techniques like the appointment and selection of executors and trustees, the "pour over will", testamentary trusts, guardianship and various methods of distributions to beneficiaries. The speaker will also help you understand what is involved in probate and administration. Other topics include risk management in will making arising from issues of incapacity, undue influence and beneficiaries that are excluded from the estate.

Course Programme

1.45 - 2.00pm	Registrations & Refreshments
2.00 - 3.15pm	Wills Boot Camp Part 1
3.15 - 3.45pm	Tea Break
3.45 - 5.00pm	Wills Boot Camp Part 2

Topics to be covered:

- Some Principles
 - The individual's capacity to make a will under his personal law
 - Restraints on will making
 - Mental Capacity
 - Situs, movables and immovables
 - Residence and Domicile
- The default law when there is no will
 - Aspects of Administration
 - Intestacy
 - Distribution Rules upon intestacy
- Making a Will
 - What is a will?
 - Revocability Execution and Formalities of will making
 - Requirements for probate
- Anatomy of a will
- Dealing with Particular Assets
 - Non-probate assets
 - Singaporeans with foreign assets
 - Foreigners with assets in Singapore
 - Original will and Custody
 - Making multiple wills
- Appointment of Executors
 - Potential Issues
 - Appointing trust companies
- Risk Management Aspects of will making

About the Speaker

Mr. Lee Chiwi - CEO, Rockwills Group of Companies in Singapore



Lee Chiwi was called to the Bar of England & Wales as a Barrister-at-Law in 1986 and admitted as an Advocate & Solicitor of Singapore in 1988. He has a MBA from the Nanyang Business School (1996) and is a TEP (Trust and Estate Practitioner). During his time as a legal practitioner, his areas of practice were focused on corporate, commercial and private client work. He joined British and Malayan Trustees Limited (BMT) as its CEO in 2005 till 2007. In early 2008, he joined the Rockwills Group in Singapore as CEO. Rockwills is in the business of Wills, Estate Planning, the administration of Trusts and onshore and offshore corporate structures.

Lee Chiwi is the author of various books including "The Rockwills Guide to Succession and Trusts in Wealth Management" (2008), and "Drafting of Trusts and Will Trusts in Singapore" which he co-authored with the principal author James Kessler Q.C. (2007). He has also from time to time contributed articles in various Financial Journals on topics relating to fund management and financial advisory business, estate planning and trusts. He has also regularly been invited to speak at seminars and conferences on matters concerning these topics. Since 2004, Lee Chiwi has been appointed as adjunct faculty member of the Singapore Management University for their Wealth Management MSc Program, lecturing in Tax and Estate Planning. He currently serves as a committee member of the Singapore STEP Branch.

REGISTRATION FORM

Name (Dr/Mr/Mrs/Miss/Mdm): _____
 Name and Address of Organisation: _____
 STEP Membership No: _____ Position in Organisation: _____
 Tel number: _____ Fax number: _____ Email: _____
 (A valid email address is required for confirmation of registration.)

MEMBERSHIP (Please circle as appropriate.)	FEES
Members of STEP	S\$120
CFA Singapore, CPA Australia, CPA Singapore/ICPAS, International Fiscal Association (IFA), Law Society of Singapore, Singapore Corporate Counsel Association (SCCA), Singapore Trustees Association (STA), Singapore Association of the Institute of Chartered Secretaries and Administrators (SAICSA)	S\$150
Others	S\$180

- STEP Member
 CFA Singapore Member
 CPA Australia Member
 ICPAS/CPA Singapore Member
 IFA Member
 Law Society Member
 SAICSA Member
 SCCA Member
 STA Member
 Others
Mode of payment:
 Cheque
 Telegraphic Transfer
 Internet Banking

Telegraphic Transfer Details:

Account Name: STEP (Singapore Chapter) Account Number: 048-017070-6 SWIFT code: DBSSSGSG
 Bank Details: DBS Bank Address: Raffles Place Branch, 22 Malacca Street, #01-00 Royal Brothers Building, Singapore 048980.
 Please email secretariat@step.org.sg after the T/T has been done for our follow-up with the bank. Registration fees must be received nett of all bank charges.

Cheque Details:

Cheque payments should be made payable to "STEP (SINGAPORE CHAPTER)" & arrive at our office at "c/o INTELLITRAIN PTE LTD, Level 16 Malacca Centre, 20 Maacca Street S048979" with the completed registration form on or before the closing date, **Tuesday, 3 January 2012.**

For further enquiries, please contact: STEP (Singapore) Secretariat

Tel & Fax: 31287781 (no 6 prefix)

E-mail: secretariat@step.org.sg

Website: www.step.org.sg

REGISTRATION, REFUND & CANCELLATION POLICY

1. Registrations will be confirmed upon receipt of full payment accompanied by a duly completed registration form.
2. The Organisers reserve the right to refuse to register or admit any participant, and to cancel or postpone the course.
3. Equivalent substitute delegates are welcomed, subject to the Organisers being notified at least 2 working days before the course of the substitute delegate.
4. The Organisers will not entertain any request for a refund of fees. However a confirmed registrant who has paid in full the course fees but does not turn up for the course will be entitled to collect a set of the materials provided.