



Financial Planning for Families with Special Needs

Date: 20 Oct 2018, Saturday

Time: 9.30am to 12.30pm

**Venue: DSA Centre, Studio 1,
Bishan Place, #09-01,
Junction 8 Office Tower,
Singapore 579837**

Speaker's Profile: Mr Trevor Tan of Institute of Financial Literacy

Trevor is a Certified Financial Planner with more than 15 years of experience in the financial services sector. He has served more than 250 clients from all walks of life in an effective and objective manner by helping them identify and achieve their financial goals. He also served the needs of more than 10 organizations ranging from Multi-national Corporations to Small & Medium Enterprises over the years. He enjoyed his role as Moderator for the Life Underwriters Training Council by engaging professionals through case studies to create an active learning environment. Through the planning and preparation of lessons and discussion topics, he actively encouraged participation in group discussions. As the Executive Director of a community-service organization, he had the opportunity to work with the less-privileged and understand the struggles and challenges they face. Trevor holds a BSc Business Administration (Finance & Marketing), a Diploma in Life Insurance and the CFP certification.

Synopsis of Talk:

This is a workshop that comprises of 3 parts:

Learning Outcomes:

By the end of the workshop, participants will be able to:

- I. Planning Ahead For Your Loved Ones – Learn about financial planning and setting financial goals. Assess how much is needed and learn how to manage your resources.
- II. Caring For Yourself And Your Loved Ones – Learn about the steps in retirement planning, CPF and CPF LIFE schemes. Also learn about other sources of retirement income.
- III. Planning Ahead For Your Loved Ones When You Are No Longer Around – Learn about the importance of Estate Planning and about the Estate Planning Process.

Please submit your online registration at EventBrite

Closing date for registration: 18 Oct 2018

Target age group: Parents with Special Needs child

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