

Practical Estate Planning Concepts I

(Virtual Class – Live Teaching on Zoom)

Course Developer & Trainer: *Bernard Lim*



Due to the COVID-19 pandemic, the teaching mode of this 1-day course has been changed to virtual classroom via Zoom platform with live teaching consisting of lectures, role-plays (in break-out rooms), case studies and quiz. Duration is 2 x half days from 09:00 to 13:00 hours per day.

What our participants say?

Lee Si Min, Prudential (Batch 1)

I like how interactive Bernard is, good job and keep inspiring people!

Magdalen Agnes Jeremiah, Prudential (Batch 1)

This course is very helpful am sure it will help me to help my client better.

Oong Con Nie, Prudential (Batch 2)

Can we re-attend the course for refresher as it's such an amazing course and it covers many huge areas.

Sim Yueh Ting, Prudential (Batch 3)

The trainer is very knowledgeable and shared very practical ideas for my course of work.

Ezekiel Ong, Prudential (Batch 3)

Bernard is very engaging and knowledgeable in his presentation.

Ryan Koh, Prudential (Batch 4)

Very insightful and definitely offers many different perspectives & presentations which are very useful & practical!!

Marc Chan Seng Fatt, Prudential (Batch 4)

Great trainer with practical knowledge and experience!

Stephanie Lum, Prudential (Batch 5)

Bernard was enthusiastic and explained the concepts well and clearly.

Taing Pao Chou, AIA (Batch 6)

Mr Bernard Lim gave very experienced insights that were helpful and enriching.

Gavin Ho, AIA (Batch 6)

Very applicable to my line of work as a financial consultant. Excellent knowledge.

Kim Kiran Chua, AIA (Batch 7)

Incredibly proficient trainer who is clearly a subject-matter expert.

I can see how this would benefit my practice. Fantastic!

Natasha Lim, AIA (Batch 7)

Bernard was very clear in his presentation and managed to convey the importance of estate planning in a short period.

Nurul Aqillah Binte Ahmad, Prudential (Batch 8)

Bernard is a great trainer who really knows his stuff, the course was easy to follow and the case studies really help.

Alex Wiraatmaja, Manulife FA (Batch 9)

This estate planning course is very practical, relevant and helps us in caring for our clients beyond their lives better.

Paul Low, Prudential (Batch 9)

Course was very well structured even for a beginner in the industry.

Johnthan Tan, Great Eastern (Batch 10)

For Financial Planner to be competent. This course should be make compulsory

Edward Chow, Synergy FA (Batch 10)

Excellent course and very experienced and knowledgeable trainer

Desmond Teo, Prudential (Batch 10)

The trainer is good in his articulation and he has a lot of practical tips and real life experience which truly enable us to learn a lot.

Carin Seah, Prudential (Batch 11)

Mr Bernard has done a good job! He has bring about a lot of sales idea and the case studies made it more relatable

Felicia Foo, Prudential (Batch 11)

Bernard was a great trainer, he's knowledgeable and funny.

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Chng Wee Min, Prudential (Batch 12)

Very practical sharing on estate planning by Mr Bernard.

Teo Quan Fu, Prudential (Batch 12)

Bernard was able to explain the complex concepts and jargons in simple terms which are easy to understand and absorb. He keeps the class lively too by making it participative, and the sales ideas and the way he frames our minds are simply brilliant. One of the most impactful courses I've attended!

Mardiana Binte Ishak, Prudential (Batch 13)

Very useful.

Fiona Leow, Prudential (Batch 13)

More case study information on joint singles or singles not sure of how estate planning could help them. As more people are staying single.

Patricia Yeo, Great Eastern (Batch 14)

Thank you for answering our questions. Bernard is very engaging and knowledgeable as he is able to answer our questions right on the spot.

Pauline Chua, Great Eastern (Batch 14)

The case studies shared during the course is very useful for understanding the concept.

Andrea Siew, Prudential (Batch 15)

Very well thought out course structure, would recommend it to those looking for a comprehensive yet easy to understand course on estate planning.

Tan Woon Keat, Prudential (Batch 15)

Very clear presentation and something simpler for me to digest the information.

One Pei Yi, Great Eastern (Batch 16)

Bernard is very knowledgeable and the course was really insightful

Chan Yi On, Prudential (Batch 16)

I strongly recommend this course. It provides insights in a clear and concise manner.

Chang Xinyin, Prudential (Batch 17)

Mr Lim was very knowledgeable and I wish to thank him for conducting the course over the past 2 days and imparting knowledge to us. I learnt a lot from him and I definitely will wish to attend future courses conducted by him. Thank you Mr Lim!

Ferlyn Ho, Prudential (Batch 17)

Trainer was very clear and good sales ideas shared.

Calista Oh, Prudential (Batch 18)

super informative coming from a very experienced trainer. thank you so much.

Jodie Zhang, Prudential (Batch 18)

Really good course! Not much suggestion that I can think of.

Justine Lum, Prudential (Batch 19)

Bernard is very knowledgeable & shares 100% of his knowledge, withholds nothing.

Chen Aisha, Prudential (Batch 19)

Our coach Bernard Lim is excellent

Chen Runyuan, Prudential (Batch 20)

Best course I have attended so far.

Samantha Tham, Prudential (Batch 20)

Session's really good and professional, thank u Bernard!

Natalie Choo, Prudential (Batch 21)

Very informative & applicable knowledge to our work! Good training for us!

Goh Lian Muay, Prudential (Batch 21)

Good knowledge n practical!

Jane Loh, Prudential (Batch 21)

More real life cases with exceptional examples will be helpful.

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Audrey Poh, Prudential (Batch 22)

Great course and indeed practical! Would recommend my fellow colleagues to attend (:

Denise Ng, Prudential (Batch 22)

So helpful and comprehensive. Your experience and clarity is very valuable.

Can't wait to apply what I have learnt, you helped me recognize many gaps I never previously noticed in my clients and prospects portfolios.

How do you rate the overall programme structure and content?

Batch	Rating (5-point)
1	4.83
2	4.78
3	4.91
4	4.74
5	4.75
6	4.70
7	4.62
8	4.65
9	4.61
10	4.77
11	4.77
12	4.92
13	4.63
14	4.82
15	4.63
16	4.78
17	4.42
18	4.68
19	4.77
20	4.69
21	4.67
22	4.71
Average	4.72
Percentage	94.41%

What is your overall rating of the trainer (e.g. skills, knowledge etc.)?

Batch	Rating (5-point)
1	4.91
2	4.89
3	5.00
4	4.89
5	4.80
6	4.80
7	4.90
8	4.85
9	4.83
10	4.86
11	4.91
12	4.92
13	4.75
14	4.82
15	4.74
16	4.72
17	4.81
18	4.92
19	4.77
20	4.94
21	4.76
22	4.75
Average	4.84
Percentage	96.85%