What our participants say?

AIA SINGAPORE

Lee Hwei Min
Practical tools & scripts for us to put to use immediately. Bernard has been very generous with his sharing of experience and knowledge. I've learnt massively by leaps & bounds even with my basic knowledge via AEPP.
[Note: Ms. Lee had completed her AEPP course in April-2014 via a different institution > source: web directory listing]

Monalisa
Bernard is a very experience FSC & Trainer. His clarity & selfless sharing is very valuable and also his sales concepts > clear, detailed & easy to implement.
[Note: In a Sunday Times interview in Jan-2017, Monalisa expressed that her training in estate planning is one of her best investment in which the knowledge and skills she applied…..grew her business by 30%]

Edmund Lee
Bernard was extremely engaging and willing to share his experiences on the field. His knowledge, while vast, is also very digestible. Excellent course! Real, Practical presentations.

Michael Goh
A lot of real life experience was given. Bernard is highly experienced and is able to explain complex things into very clear & concise examples.

Chan Hwee Ling
Bernard (trainer) is very helpful in answering our queries as well as the case studies we brought up in class. This class has taught me more than any other courses I have attended and the knowledge acquired is very useful in our line of business.

Yohandi Zou
Very applicable and relevant topics and very useful case studies. I would recommend this course to all financial consultants. Bernard Lim is very qualified and experience trainer in subject topic.

A Tan
Very happy that I had attended this course. It widens my aspect to more openings and areas I could have explore; especially thru the use of estate planning model! Examples given are real life.

Linda Lee
Easy to understand. Stories are powerful and useful. Bernard's personal experiences are also very motivational and gives us confidence to launch into this direction!

J Toh
Very interactive & lots of role play. Designed for field practitioners. Summary given & review of previous lesson. Lecturer is friendly and open to consultation (Thanks Bernard).

R Quak
Good knowledge and sales ideas. Good power phrases.

Jenney Mah
Role play & case studies very practical...

Rebecca Quek
Bernard is Estate Planning Guru! Invaluable sharing! Please bring him back….

Leslie Seah
Will help me expand my business horizons. Would like a follow-up course after one-year of practical experience.

Li Hao
Very practical, let us have a in depth knowledge on Insurance and how Insurance can solve the problems for HNWIs.

Zeng Guowei
Get Bernard back for more trainings!

Benjamin Low
It opens/re-opens market horizon.

Wang Zhiheng
Bernard has a vast knowledge on Estate Planning and this course is a must for any financial planner…

Han Boon Kiat
Very Practical lessons. Usable skills and knowledge.

Xie Ke
Very practical lesson & shared a lot of real case and we did case study to understand the coverage better.

Tan Khoon Wah
Trainer is generous in sharing experiences. Ideas are refreshing. He is keen to share…

Melvin Toh
If you want to be a true professional, this is a course to attend. There is tremendous value in it.

Attendee "A"
Very useful model & templates. Legal aspects sharing.

Sharmaine Lim
Very beneficial, more than just selling insurance. Providing value-added service for clients even to myself

Willie Tan
Course is very benefiting to our job scope.

Serene Neo
Highly recommended to enhance & build professional expertise. More time for case studies.

Joshua Lee
The course is informative and open up our views to see things differently. A must to do if any FSC wishes to stay competitive. Having more case studies

Angela Lau
Notes and articles provided are very useful reference. Entertaining trainer!

Benson Lin
Any financial services consultant who's serious about providing above average advice/analysis must attend this course.

Edward Ong
The course is very practical-based and one can immediately launch into application to help our higher net-worth clients in financial planning & wealth management.

Jamson Chia
The course has been useful, especially the models used. It helped to open one high net worth case for myself.

AIA FINANCIAL ADVISERS

Ashraf
Great trainer/coach!

Lim Siew Ting
Simple & relatable course!
Concepts learnt here can be applied! Ready, easily!

Angelina Liu
Very practical framework shared & exercises done that I can use immediately as a practitioner. Bernard was also very engaging & generous in his sharing.

Chien Xiu Wen
Trainer is extremely engaging & knowledgeable
Enjoyed every hour with Bernard!

Chua Li Hao
Great! Very entertaining and engaging way of teaching

Triton Chan Kar King
-Case studies were very useful.
-Role plays were essential.
-Training was very thorough...
-1st course in which I didn't fall asleep because of how engaging the trainer was!

Chin Yien Jun
Estate planning course by Bernard has been impactful & meaningful. Clear & Concise. The content was apt and relevant to all others involved in FA services. Recommended.

AXA LIFE INSURANCE

Tan Hoon Lay
The course is simply excellent. The sharing, knowledge & concepts are so well conversed. It just set me to re-think about those 'missing parts' of what I could have value add to my clients. Thanks Bernard & Paul for your time!

Er Jia Li
It's really an eye-opener! Bernard is very helpful & knowledgeable. This is the course that I enjoy most among all the financial planning related courses. Bernard's experience shared in the class is invaluable to me, would love to come back for any refresher course that he conducts.

Ong Ziheng
Provided me a new horizon towards estate planning. Increase my practical and presentation skills.

CITIBANK SINGAPORE LTD

Dennis Ng
It has given me a whole new fresh perspective of Estate Planning. Instills new confidence in handling the toughest type of estate planning.

Sim Peck Cheng
Felt it is a very practical course with a lot of my previous queries where nobody could give me a definite answer have been answered. Hope to have more follow up courses.

FINANCIAL ALLIANCE

Edwin Siew
Relevant. Can see myself using the template to close cases and providing a service in estate planning.

Nadia
- The fact that the course is in layman's terms - definitely help.
- It's so practical (know-how to be able to apply/put it into practice) - unlike other course very theory-base.

Shafee
Others should attend this course. It is very informative.

Winnie Chan
I especially like the Funnel Concept, very useful to talk to HNW clients.

Tea Eng Peng
Giving a lot of values and extra tips which are practical and useful.

Chew Hock Beng
Practical & useful.

Winston Khoo
Systematic, layman enough to understand and easy to understand framework.

Khor Chee Kok
Good sharing & lively exchange of thoughts & experiences.

Ang Kok Chin
Bernard is both passionate and knowledgeable in the area of estate planning. He has provided very simple and easy to use model to both [to] explain wealth and estate planning.

Adeline Yeo
The course provides practical knowledge & applications to my advisory business. The wealth planning model & estate planning provides a simple to understand & key concept which I can share with my prospects which I believe will stir their concerns & open up opportunities for life long client-adviser relationship.

Victor Chong
Great clarity on the insurance nomination/estate distribution.

Francis Hoan
Good interplay of lectures, role plays, discussions & case studies.

Michael Tan
Enjoyed the course. Bernard made a tough subject entertaining & easier to comprehend.

Attendee #28
Different models for different target clients make it highly relevant. Very good explanation on the legal aspects.

Attendee #29
Very easy to apply & remember; Big picture concepts; Role play is effective...

Attendee #30
Very practical, can be used immediately in the market.

Kelvin Lee
This course bridges the gap in our typical CFP coursework.

Alvin Leong
It is a very practical course that really help to equip oneself with the immediate skills & knowledge to apply immediately in the field.

GREAT EASTERN FINANCIAL ADVISERS

Wong Felicia
Bernard is knowledgeable & share lots of experience & case studies.

Oh Eng Ann
Really applicable knowledge & skills to differentiate us from the rest of the industry.

Clement Tan
It is a very enriching course, open my mind to the opportunities….Thank you Bernard.

Anish M
Very engaging 3 days with Bernard!

Gabriel Leng
Bernard is very well-equipped with vast knowledge & experience. Fun class to be in likewise.

Bryan Lim
Exceptionally brilliant. One of the best & most useful/applicable courses I've ever attended!

Wong Felicia
Bernard is knowledgeable & share lots of experience & case studies.

Oh Eng Ann
Really applicable knowledge & skills to differentiate us from the rest of the industry.

Clement Tan
It is a very enriching course, open my mind to the opportunities….Thank you Bernard.

Keith Chua Fu Cheng
Bernard is a very knowledgeable man, who's very willing to share his knowledge & experiences. Bernard is patient & generous too. Learnt a lot under his coaching & I'm sure it'll improve my business.

Zoe Ang Hui Yun
Bernard is an extremely well-versed and knowledgeable lecturer. The information and skills I have gained is useful and applicable.

Bryan Chua Jian Wei
Comprehensive course on estate planning, which is highly relevant to extending my scope as a financial consultant. Thank you, Bernard.

Nasirah Banu
Very well structured course with relevant information that can assist in value-adding to my clients.

Paul Chew Ren Han
Makes you rethink your entire practice. You will realise the market is larger than you thought.

April Tin Htun
He (trainer) explains very well and drawing models are very easy to understand. Thank you for all your effort. I will wish to learn more in the future.

Sunny Yap
Excellent! Concise, practical with real field experience.

Chua Rongda
I feel that this is the way to go on this financial industry. This course really value add to clients and establish long lasting relationship with clients.

Nigel Eng
Thanks to the trainer for making this knowledge based programme with interesting case studies and role plays.

Shankar
Excellent course. There is so much of information that we can apply to our work.

Daniel Chang
This is probably the most systematic yet practical course on estate planning that I have attended. The information, concepts, ideas & tools are transferable and applicable immediately. I highly recommend it to those who want to move on to the next level of wealth planning!

Roseline Ter
Eye opener to me as I have attended some other estate planning courses but what trainer shared is not just based on insurance central but other value services to his client. He is unselfish by sharing all he knew to us.

John Seah
Bernard is extremely knowledgeable and his experience in the industry helps to put many things in perspective by relating his real life experiences. He answers questions to satisfaction and provides value to each question more than just giving an answer.

Michelle Lim
Excellent perspective on importance of estate planning. Adds value to myself and my clients in terms of holistic planning.

Angeline Chong
Bernard is extremely knowledgeable and insight in the financial industry. His friendly and abundant sharing keeps us very excited coming to his classes. Look forward to attending more of his training.

Cynthia Sunarko
The examples given during the lecture and the exact way he delivered the content to the client, the choice of words etc. was very helpful.

Candy Ho
Trainer is very experienced & his practical tips enable practitioners to use it in marketplace easily.

Annabel Woo
- Learnt a lot from the course and gave me the knowledge and skill to move up market.
- Real life examples really helped us well.

Choe Kee Hong
This course gave me the opportunity to open a new market to tap on and add value to my clients' financial planning.

Briony Guntzenbach
Very insightful, case studies were interesting. Has brought the concept of selling insurance to another level.

Annabelle Lim
I appreciate the effort in collating the facts and steps to do Estate Planning as we normally find it difficult to fix the pieces together.

Linda Tan
... the concepts, deliverables, information and skills have given me the confidence. And, tools to ensure that my clients are well taken care of; with that, I will be too. Heartening!
Charmain Hng
Trainer is informative and helpful. Would greatly recommend this course. Have learnt a lot.

Colin Ong
Overall excellent course and trainer punctuates training with greatness. Brilliant!

Sandy Tay
Structured and useful presentation scripts and materials is practical in application.

Chen Mingkun
Very practical. Bernard is very passionate in teaching, knowledgeable and pushes the class for practical learning through role play. Very excellent course!

Sherin Lew
All FCs should have the knowledge of the course to perform holistic & professional advice for clients.

Vincent Gan
I think the course is very well designed & delivered.

Sean Tan
Very good information given by Bernard. Practical ideas that we can implement in our business.

Kelvyn Choo
Definitely useful & crucial knowledge to spur my business going forward.

Cerlyn Lau
Trainer managed to convey the dry legal and course in a very simplified manner. Very easy to understand.

Dexter Yeo
Best course of the decade !!

Wong Shuwen
Trainer is extremely animated and engaging, which made the class a lot more enjoyable.

Attendee #27
Useful insight with practical examples!

Attendee #28
Fantastic course. Very detailed & useful insights on estate planning.

Attendee #29
Excellent information. Trainer is very well prepared.

Attendee #30
Course is well-planned and I am confident to say that we walked out a better FC.

Attendee #31
Excellent trainer. Highly recommended for anyone serious about financial advising.

IPP FINANCIAL ADVISERS

Chua Chim Keng Joash
An authoritative course with a focus on competency & professionalism.

Max Moi
Excellent opportunity to learn and apply knowledge in real practice for business & professional growth.

Gabrielle Loke
What did you like about this training? Answer: Everything! Course is well structured

Nicolette Gnoh
- Having all the readily available resources organised so systematically makes the entire process more understandable. An excellent roadmap/framework which enables the FC to grow in competence and professionalism.
- Please have refresher courses or even sharing of practical application post-course.
- Thank you so much for your generosity, Bernard!

Chua Kim Peng
Effective process... Practical presentation... Comprehensive knowledge & information.

MANULIFE SINGAPORE

Sarah Lee
Simple but powerful presentations which can be applied readily on the field. Brilliant case studies which are helpful to create a niche in estate planning.

Suanne Chai
This course is mind-blowing. Great exposure.

Aldric Tan
What did you like about this training? Answer: Charisma, eloquence and knowledge of Trainer (Bernard).
Totally crucial and holistic to the art of estate planning. Guaranteed to enhance service quality, professional expertise and ultimately, income remuneration.

Zenden Lee
Trainer is very knowledgeable & sharing is very applicable immediately.

Yugavardhan
Give me a perspective of insurance and how much more it is compared to what I have known about it.

Cilia Kho
This is one of the most beneficial training course relevant to my practice so far. The trainer is an excellent teacher & helps students to internalize, professionalize & naturalize by repeating essential points & crystallize the concepts in a way that are easy to understand."

Ting Chee Kheong
Good deliverables.

Teng Chee Kiong
Too good, only gains but nothing lose!

Jeanie Tan
Trainer is very sincere & open about his sharing and case study sessions were very helpful.

NTUC INCOME

Jimmy Lee
…. I never felt bored in the lecture and able to follow thru …. There is always new room to learn new things.

Lynn Cheong
An excellent and practical wealth planning course addresses the needs of PEMBs that is both comprehensive and systematic. Certainly a very useful course for those who wish to do business with higher net worth individuals.

PRUDENTIAL ASSURANCE

Carol Kheng
The constant challenge for me as a practitioner is to find ways to add value to my clients and thereby earning the right to a bigger bottom line. This estate planning course has certainly given me a cutting edge in winning over customers and over the competition!

Nicholas Goh
Personally, I feel that this course is one of the best in the market today - practical, relevant and well-delivered. I am of the opinion that every adviser who wants to develop professionally in his/her career should make this course a MUST. I am encouraging all my advisers to make the AEPP a priority for themselves. Great work Wealth College!

Edward Chow
I have known Bernard for many years, and have personally benefitted from his passion and excellent estate planning concepts he has taught. His generous sharing has certainly helped me drive up my business! I highly recommend it to anyone who wants to get to the top!

Pearlyn Loh
This is a practitioner driven course which uses real life real time examples to deliver a compelling programme which every estate planning practitioner should attend.

Amanda Tse
I believe that what I've invested is worth cos I gain knowledge, value and self-worth to myself and my clients, most importantly.

Nur Kamilah
My closing rate has improved tremendously when I use the wealth planning model and it increases my confidence to meet the higher income group.

Evelyn Fong
This course has given me greater confidence to engage with high net worth individuals. I can now visualize myself doing the role of a wealth planner rather than just a financial adviser!

Eileen Teo
This course has empowered me with the skill and knowledge of estate planning which will help me to be more cutting edge in my industry.

Michele Tan
The course gives a very comprehensive insight to estate planning, that increases our value to provide solutions to more complex issues.

Roland Wong
Great teaching methods & analysis used in course. Useful & practical worksheets. An eye opener for all insurance practitioners to move into wealth planning.

Karen Tay
A great course especially for those who wish to engage into the high net worth market, and for financial advisers to provide value-added advice to their clients.

Cindy Ng
This course has given me great ideas to approach my clients with confidence and empower me with knowledge. I can't wait to close a case with estate planning!

Caden Chia
It provides excellent knowledge and gives confidence to me as a financial consultant, and also enhances my personal value to my customers.

Ronald Wong
Course very well conducted, you made a dry course interesting, and I learnt a lot from it. However, it would be good if we can learn more about the support structure during the course.

Chua Cheng Chuan William
The contents are very practical & in-depth. Recommended for senior advisers in financial industry.

Cindy Huang
This is definitely a very important tool in wealth planning process. It is enriching & give me better understanding in the legal & tax aspect. Bernard's sharing is selfless. Great job!

Editor note:

1. Effective January 2012, Wealth College has withdrawn our highly-rated practical estate planning course and training as the basis for the attainment of the AEPP designation. We do not wish to be held responsible for any possible misrepresentation by other institutions because the contents are not the same as the original materials developed and trained by Bernard Lim, via Wealth College from 2007-2011. The copyright of the course materials and estate planning templates are owned by Wealth Hub Pte Ltd. Any unauthorised reproduction by any means is a violation of intellectual property laws.

2. Some respondents to our feedback opt to remain anonymous; with some citing the Personal Data Protection Act.