

Application Form

Associate Specialist in Estate Planning – ASEP™ Designation



The **Associate Specialist in Estate Planning (ASEP™)** designation is jointly awarded by Fincare Global Pte Ltd (a member of raiSE) and Wealth College (division of Wealth Hub Pte Ltd).

In compliance with the Personal Data Protection Act (PDPA), Singapore; your personal data provided in this application form is used solely for its intended purposes by all parties in the certification process.

Qualifying Criteria

- (1) Minimum 2 years of practical work experience in the financial services industry.
- (2) Successfully completed the "Practical Estate Planning" training programs.
- (3) Passed the "Practical Estate Planning" Examination by Wealth College.
- (4) Possess **ONE** of the following qualifications ****Attach a PDF copy of your paper qualification****
 - Passed Module 1 CFP Exam
 - Passed Module 1 ChFC Exam
 - Possess CFP or ChFC/s Title
 - Passed Certificate in Financial Needs Analysis and Plan Construction by SCI
 - Possess Polytechnic Diploma or University Degree - Business, Economics, Banking, Finance, Accountancy.
 - Passed Diploma in Insurance by SCI
 - Possess the Chartered Life Underwriter (CLU) by SCI
 - Possess the ALP or AFC or AFP or AWP Title

Terms & Conditions (Must read)

1. Applicant must **fully** meet the Qualifying Criteria (1) to (4). Successful applicant must abide by the professional Code of Conduct & Ethics of a financial services representative under the licensing of the Monetary Authority of Singapore.
2. Successful applicants shall use the letters, ASEP after their names in business cards/marketing tools for life by paying a one-time designation fee. The use of the ASEP Title is effective after the ASEP Certificate is issued.
3. Applicants must submit all required documents & details upon application; progressive submission is not acceptable. If any document/detail is missing, the application is invalid and will not be processed.
4. The processing time is 2-3 weeks. Certificate will be delivered by special mail to the address provided. Applicant shall bear the subsequent courier fees for any wrong address given or changes in delivery by you.
5. Fees paid are non-refundable in the event the application is rejected for failing to meet the Qualifying Criteria.

Fees & Payment

Designation Fee = SG\$250.00. One-time payment for **Lifetime use** ~ no yearly renewal membership required!

Payment is due upon application. Please select **ONE** payment mode and tick the box below:

PayNow! Corporate UEN **200702674R** | Account name: Wealth Hub Pte Ltd

Internet Banking – Fund transfer to Wealth Hub Pte Ltd

Bank: United Overseas Bank(UOB) Account number: 372-301-218-8 Branch code: 046

Note: For proof of e-payment, provide a screenshot image of your transaction.

All fields below are mandatory – please fill in details fully (write NA if not applicable/none)

Name of applicant (as in ID card)		Name to print on Certificate (please write clearly in CAPS)	
ID/Passport No.	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Nationality	
Mobile Tel No.	Company		
Job Title	MAS (RNF) – Rep. Registration No.	MAS – Issue Date of Licence (dd/mm/yyyy) (Ref. MAS Register of Rep on www.mas.gov.sg)	

Postal address (for mailing of Certificate. Post box address is not acceptable. Please write clearly)

Singapore | | | | |

Email address (please write dot, hyphen or underscore mark clearly)

Achievements (e.g. awards, community services)

Please answer these questions (which are compulsory):

1. Have you been accused or convicted of any criminal offence? Yes No
2. Have you been a defendant or respondent in any criminal action relating to your professional or business conduct?
 Yes No
3. Have you been a defendant or respondent in a civil action, which includes but not limited to, a lawsuit, arbitration or mediation relating to your professional or business conduct? Yes No
4. Have you ever been involved in any criminal, civil, self-regulatory organization or governmental agency inquiry, investigation or proceeding? Yes No

* If you answered "yes" to any of these questions, please attach an explanatory note on a separate sheet of paper. All information is kept in strict confidence. Upon review, we may contact you for a phone or private interview. The Review Panel decision is final and we reserve the right to reject your application without stipulating the reasons.

DECLARATION

I declare that all information given by me in this form is true and correct and I understand that any misrepresentation or omission of information is sufficient ground for rejecting my application. I also authorize an investigation of the above information for the purpose of verification, if required. In addition, I have read and agreed to the Conditions stipulated in this application form.

✱ **Signature**

Date

HOW TO SUBMIT?

All electronic documents must **be legible, or risk being rejected**. Please email your Application Form, copy of paper qualification (**in PDF only**) to admin@wealthcollege.com.sg with screenshot image of your e-payment transaction. **Paper qualifications in .jpg/.png/.tiff image format will be rejected.**



- ❖ Do ensure that you fully meet the qualifying criteria. The minimum 2 years of practical work experience is based on the issue date of your licence, published on MAS Register of Representative listing. Fees paid are not refundable in the event the application is rejected.
- ❖ To include the relevant paper qualification required in the Qualifying Criteria column with this Application Form and screenshot image of e-payment transaction.
- ❖ Electronic submission of **2-page Application Form & paper qualification must be in PDF only.**
- ❖ Progressive submission of paper qualification is **not** acceptable; application is invalid and will not be processed. Fee paid is not refundable.

Need help?

For time-critical issues - WhatsApp/Call: 9862 9012 (0900-1200 Hours, Mon-Fri except public holidays)
For non-urgent issues/general enquiry – use Contact Form on www.wealthcollege.com.sg/contact

FOR OFFICIAL USE

Cert. No.	Date of issue	Invoice No.
Handled by	Dispatch date	Registry update
Interview <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, state date:	Remarks (if any)	