

Advanced Legacy & Estate Planning Practitioner (ALEPP)

TAKEAWAYS & BENEFITS

Build credibility and solid legal knowledge in estate planning

Establish stronger client trust through structured estate planning workflows

Gain practical skills to explain Wills, LPA, trusts and ACP with confidence

Expand your service offerings and outreach opportunities



Lead Trainer

Shane Toh

Associate Director and
Principal Estate Planner
AEPP, FChFP
Mezzanine Legacy



Trainer

**Celeste
Cordeiro**

Associate Director,
Eastern Mezzanine Law
Corporation

Learn estate planning through a structured two-day programme that focuses on real cases, legal tools, and practical coordination from real practitioners and lawyers.

Build the confidence to advise families, business owners, and professionals astutely.

Complete the assessment to receive your ALEPP certification from Mezzanine Institute.



WHO SHOULD ATTEND

✦ Financial Planners

✦ Insurance Agents

✦ Bankers

✦ Real Estate Consultants

✦ Junior Estate Planners

✦ Professionals Expanding their Advisory Scope

OUR PARTNERS





Shane Toh

Associate Director and Principal
Estate Planner *AEPP, FChFP, ALES*
Mezzanine Legacy



ABOUT THE TRAINER

Shane brings extensive **real-world experience** to the table, having personally planned for multiple estates across different client profiles.

As a former financial advisor who built his advisory practice with estate planning at its core, he has achieved multiple MDRT successes by applying comprehensive, well-structured planning to better serve his clients.

He also designed WISH (Will Integration Strategy Hub), Mezzanine Legacy's proprietary platform that structures the entire life cycle from asset identification and client discovery to Will planning and signing, bridging the gap between "I know" and "I can confidently execute" so advisors can deliver estate planning with clarity, confidence, and real-world impact.



Celeste Cordeiro

Associate Director,
Eastern Mezzanine Law Corporation



ABOUT THE TRAINER

Celeste advises on **regulatory** and **compliance matters** in estate, wealth, and financial planning.

Drawing on her background in family law litigation, she brings a keen understanding of complex family dynamics to her estate planning practice. This perspective allows her to deliver strategic, legally robust, and practical estate and succession solutions tailored to Singapore's evolving regulatory landscape.

COURSE PRICING **\$780**

All prices are nett with no GST

COMES INCLUDED WITH:

- Lunch & Refreshments
- ALEPP Certification

29 & 30 APR TWO DAY COURSE

9.30AM to 3.30PM

Estate Planning Frameworks and System Design

- How a will operates within the full estate planning system
- Scope limits, authority gaps, and post-death timing risks
- Structural causes of planning failure

Legal Instruments and Execution Architecture

- Wills, LPAs, trusts, nominations, and succession instruments
- Layered will design and execution integrity
- Authority roles, appointments, and governance

Coordination, Integration and Case Complexity

- Asset distribution timing and fairness risks
- Trust governance and common failure modes
- Integrating insurance, business, and personal plans

The Mezzanine Ecosystem & Pathways

- Introduction to how Mezzanine supports this process:
 - Exclusive estate planning and business support
 - Referral fees to support your advisory work
- How WISH amplifies your services

**Ready to add estate
planning to your scope?**

Register Now →