Steps, Procedures and Requirement for Think Plus Academy's Competency Certificates in Estate Planning

1. Introduction

This document outlines the steps, procedures and the requirements to earn a Think Plus Academy Estate Planning Certification: Certified Estate Planner (CEP), Certified Estate Planning Manager (CEPM), and Certified Estate Planning Consultant (CEPC) from Think Plus Academy. Think Plus Academy acts as the awarding body for these certificates, ensuring they meet stringent internal quality standards.

2. Candidate Eligibility and Application

Think Plus Academy offers three Estate Planning Certification programs, each with its own eligibility criteria.

Here's a breakdown for each program:

Certified Estate Planner (CEP):

- **Target Audience:**
  - Individuals new to the field of estate planning.
  - Professionals seeking to enhance their basic estate planning knowledge.
  - Individuals considering a career shift into estate planning.
- **Eligibility Criteria:**
  - Minimum age of 18 years old.
  - High school diploma or equivalent.
  - No prior experience in estate planning required.

Certified Estate Planning Manager (CEPM):

- **Target Audience:**
    - Professionals working in related fields such as finance, law, or accounting who want to specialize in estate planning.
    - Existing estate planning professionals seeking to elevate their expertise and management skills.
- **Eligibility Criteria:**
    - Minimum age of 18 years old.
    - Bachelor's degree in a relevant field (e.g., finance, law) or equivalent experience in a related field (minimum 2 years).
    - Basic understanding of estate planning principles (Think Plus Academy's CEP program or equivalent knowledge is recommended).

Certified Estate Planning Consultant (CEPC):

- **Target Audience:**
    - Experienced estate planning professionals seeking to become trusted advisors.
    - Professionals with a strong foundation in estate planning who want to master advanced concepts.
- **Eligibility Criteria:**
    - Minimum age of 18 years old.
    - Bachelor's degree in a relevant field (e.g., finance, law) and a minimum of 2 years of experience in estate planning.
    - Completion of a recognized Estate Planning Certification program (Think Plus Academy's CEPM program or equivalent is recommended).

Additional Considerations:

- Think Plus Academy may consider offering preparatory courses or resources to help individuals meet the eligibility criteria for each program level.
- Work experience in relevant fields (e.g., financial planning, legal services) could be considered for candidates without a directly related degree, but such cases might require additional evaluation.

Overall, Think Plus Academy's Estate Planning Certification programs cater to individuals at various stages of their careers who are interested in gaining the knowledge and skills to excel in this important field.

3. Application Process for Online Exam and Fees

Training Provider Recommendation: For candidates seeking Think Plus Academy certification after attending training from an approved external provider, Think Plus Academy may consider recommendations from the training provider regarding the candidate's background and eligibility.

Application Process: A standardized application process fee payment, and submission of required documents is written below.

Training Provider Applications: Training providers seeking Think Plus Academy certification for their students will submit a list of candidates via an application form.

Think Plus Academy Exam Fees and Schedule for Estate Planning Certificates

Online Exam Fees:

- Certified Estate Planner (CEP): RM100 per person (50 Multiple choice Questions)
- Certified Estate Planning Manager (CEPM): RM200 per person (100 Multiple Choice Questions)
- Certified Estate Planning Consultant (CEPC): RM300 per person (150 Multiple Choice Questions)

Passing marks is 60% of the exam questions.

Exam Schedule:

Exams are held once a month on the first Wednesday.

Payment deadlines: To register for the exam in a particular month, payment must be received by Think Plus Academy by the 15th day of the preceding month.

Exam Results and Certificates:

Exam results will be emailed to candidates after the exam completed.

Certificate of Exam Assessment will be issued after the exam completed.

4. Certification Process, Requirement and Fees

Think Plus Academy Incorporates Sustainability into Estate Planning Certifications

Think Plus Academy's commitment to integrating **sustainability principles** into estate planning practices. To ensure the competency of certified professionals in this area, an additional assessment will be implemented.

Key Points:

- **Sustainability Leadership Assessment:** Candidates for **all levels** (CEP, CEPM, CEPC) will undergo an assessment evaluating their understanding and application of sustainability practices within estate planning.
- **Assessment Fees:** A fee of RM150 will be charged per candidate to cover the assessment process.
- **Assessment Formats:**
  - **Certified Estate Planner (CEP):** Assessed through a **questionnaire** focused on knowledge of sustainability practices relevant to estate planning.
  - **Certified Estate Planning Manager (CEPM) & Certified Estate Planning Consultant (CEPC):** Assessed through an in-depth **interview** to evaluate their ability to apply sustainability principles in real-world scenarios.

Certification Requirements:

- **Successful Completion of Relevant Course:** Complete the designated Think Plus Academy course for your desired certification level (CEP, CEPM, CEPC).
- **Passing Score on Estate Planning Online Exam:** Achieve a minimum of 60% on a comprehensive exam covering essential estate planning knowledge.
- **Sustainability Leadership and Practices Assessment:** Pass the sustainability leadership assessment, demonstrating your understanding and application of sustainability principles in estate planning. The format varies by program level:
  - **CEP:** Pass a **questionnaire** focused on sustainability knowledge.
  - **CEPM & CEPC:** Pass an in-depth **interview** testing your ability to apply sustainability in real-world scenarios.
- **Assessment Fee:** Pay a non-refundable assessment fee of RM150 to cover the sustainability leadership assessment.
- **Evaluation and Results:** Candidate assessments will be evaluated by qualified personnel using defined criteria. Successful candidates will receive a certificate of competency issued by Think Plus Academy. Final results will be issued within a designated timeframe (e.g., one week).

5. Training Program and Course Fees

Think Plus Academy Estate Planning Course Fees

Course Delivery: Think Plus Academy will offer its own training programs delivered by certified trainers. Additionally, approved external training providers can deliver their own courses relevant to the certificate programs.

Training Application: Information on Think Plus Academy's training programs and the application process will be available on website www.thinkplusesg/estate-planning

The course fees for Think Plus Academy's Certified Estate Planner programs are as follows:

Face-to-Face Structured Learning:

- **Certified Estate Planner (CEP):** RM1,300 per person (One-day Course)
- **Certified Estate Planning Manager (CEPM):** RM2,500 per person (Two-day Course)
- **Certified Estate Planning Consultant (CEPC):** RM3,800 per person (Three-day Course)

Online Learning:

Think Plus Academy offers around 20% discount on the fees for online versions of their estate planning courses. Here's the breakdown:

- **Certified Estate Planner (CEP):** RM1,000 per person (One-day Course - Online)
- **Certified Estate Planning Manager (CEPM):** RM2,000 per person (Two-day Course - Online)
- **Certified Estate Planning Consultant (CEPC):** RM3,000 per person (Three-day Course - Online)

Important Note:

It's recommended to visit the Think Plus Academy website www.thinkplusesg/estate-planning or contact them directly for the latest fee confirmation and any additional course details (e.g., registration process, materials included for online courses).

6. Payment Procedures

Payment Information:

Think Plus Academy Bank Account

Think Plus Academy Sdn Bhd
Account Number : 5648-7450-8532
Bank Name : Malayan Banking Berhad (Maybank)
Swift Code : MBBEMYKL
Branch Adress : Plaza Arkadia, Desa Park City, Kuala Lumpur

7. Maintaining Quality and Competency

Assessment Administration: Standardized procedures for assessment administration are established to ensure fairness and consistency across all testing locations.

Continuing Education: Think Plus Academy may offer continuing education programs to allow certificate holders to demonstrate their ongoing knowledge and skills.

8. Benefits of Think Plus Academy Certificates

- **Demonstrated Expertise:** Earning these certificates signifies a candidate's knowledge and skills in estate planning, as validated by Think Plus Academy's internal quality assurance processes.
- **Industry Recognition:** Think Plus Academy's collaboration with industry organizations & associations (e.g., Holistic Wealth Group, Malaysia Will and Trust Association) further enhances the credibility of the certificates.
- **Career Advancement:** Candidates with these certificates can enhance their resumes and credentials for estate planning positions.

9. Summary

By following these steps, procedures and requirements, Think Plus Academy create a robust system for awarding competency certificates in estate planning. This system offers flexibility for candidates by allowing them to pursue training through Think Plus Academy or approved external providers. The focus on internal quality assurance and potential industry recognition ensures the value and credibility of Think Plus Academy's certificates.

Think Plus Academy's Commitment to Sustainability:

We are committed to integrating sustainability principles into estate planning practices. This assessment ensures our certified professionals possess the knowledge and skills to navigate the evolving landscape of sustainable estate planning, offering clients future-proofed guidance that aligns with their values.

Ready to Get Started?

Visit our website www.thinkplusesg/estate-planning to explore program details, course fees, and application procedures. We look forward to empowering you to become a certified estate planning professional who can effectively navigate the complexities of estate planning while prioritizing sustainability.

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