

TGS-2025057369

IN-PERSON WORKSHOP

Wealth Advisory Program (WAP) – Module J: Facilitating Intergenerational Family Wealth & Legacy Conversations

 **Target Audience**
Private Bankers, Relationship Managers

Duration: 7 CPD Hours
Fee: SGD 1500 per participant

EARLY BIRD DISCOUNT
Enjoy **10% discount** when you register **one (1) month before** the course commencement date.

Key Business Outcomes

- Strengthen client relationships, driving an increase in trust, retention, and loyalty.
- Boost cross-selling revenue by equipping bankers with actionable frameworks to deliver tailored client solutions.
- Strengthen the bank's market leadership in inter-generational wealth solutions with a proven approach.

>> Key Learning Outcomes

- **Knowledge:** Understand key principles and frameworks for effective family wealth and legacy planning.
- **Soft Skills:** Master techniques for asking powerful questions, handling objections or difficult conversations, and summarizing discussions.
- **Technical Skills:** Learn when and how to involve experts in complex conversations.
- **Mindset:** Cultivate empathy and solutions-driven thinking for navigating family dynamics effectively.

1. Key Topics

- Dynamics of Intergenerational Wealth Transfer
- Key Statistics & Trends in Family Wealth Longevity
- Common Pitfalls in Family Wealth & Legacy Discussions
- Examples of Failed Wealth Transfers & Fractured Relationships
- Examples of Well-executed Intergenerational Conversations & Legacy Planning
- Generational Engagement & Bridging Gaps Between Family Members

2. Framework & Tools

- Mastering the Art of Facilitation – The F.A.M.I.L.Y. Framework
 - Family
 - Assets
 - Mission
 - Impact
 - Legacy
 - Youth Engagement
- 5 Core Facilitation Skills for F.A.M.I.L.Y. Conversations
 - Open Questions
 - Structured Meetings
 - Preparation
 - Summarizing Skills
 - Listening & Mediation
 - Identifying when to bring in specialists (Internal / External)

PRACTICE & APPLICATION

- Applying the F.A.M.I.L.Y. Framework & Tools
 - Role-Play A: Aligning Family Values
 - Role-Play B: Navigating Conflict & Building Consensus
 - Role-Play C: Engaging the Next Generation
 - Role-Play D: Action Plans & Presentation

KEY VALUE PROPOSITION

- Customized to each client's unique family and wealth dynamics for personalized engagement.
- Actionable frameworks and facilitation techniques that can be immediately applied to real-world family wealth and legacy conversations.
- Hands-on learning through role-plays, case studies, and expert feedback to build confidence and practical expertise in managing family discussions.

This course addresses the following **Technical Skills and Competencies (TSCs)** and proficiency level: **Future-Enabled Skills - Customer Acquisition Management (Proficiency Level 4)**

Participants are encouraged to access the IBF MySkills Portfolio (<https://www.ibf.org.sg/home/for-individuals/resource-tools/myskills-portfolio>) to track their training progress and skills acquisition against the Skills Framework for Financial Services. You can apply for IBF Certification after fulfilling the required number of Technical Skills and Competencies (TSCs) for the selected job role. Find out more about IBF certification and the application process on [here](#).

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