

2025

**IBF ACCREDITED PROGRAMME**

IBF - FINANCIAL TRAINING SCHEME (IBF - FTS)



# ★ RETIREMENT PLANNING WITH CPF PROJECTION TOOLKIT



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FOR REGISTRATION INFORMATION

INTEGRATE

# CPF

FOR COMPREHENSIVE  
RETIREMENT PLANNING

EMPOWER WITH

# TOOLKITS

FOR CLARITY & ACTION

\* GET UP TO

# \$500

IBF FUNDING SUBSIDY

\* T&C APPLY

Kevin Koh CFP®, IBFA, ACLP  
Principal Trainer  
Level Up Academy



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FOR TRAINER PROFILE

# IBF ACCREDITED PROGRAMME

IBF - FINANCIAL TRAINING SCHEME (IBF-FTS)

**RETIREMENT PLANNING  
WITH CPF PROJECTION TOOLKIT  
(SYNCHRONOUS E-LEARNING)**

PROGRAMME CODE

**TGS-2023039860**



**ONLINE ZOOM**

ONE DAY PROGRAMME  
0930 - 1745 HOURS

**FULL COURSE FEE : \$899**

NETT FEE AFTER IBF SUBSIDY  
**\$629.30\*\* OR \$399\*\*\***

**RETIREMENT PLANNING  
WITH CPF PROJECTION TOOLKIT  
(CLASSROOM)**

PROGRAMME CODE

**TGS-2023021869**



**CLASSROOM**

ONE DAY PROGRAMME  
0930 - 1745 HOURS

**FULL COURSE FEE : \$1,000**

NETT FEE AFTER IBF SUBSIDY  
**\$700\*\* OR \$500\*\*\***



**CLICK HERE**  
FOR REGISTRATION INFORMATION

\*\* SG CITIZEN BELOW AGE 40 OR SPR, AFTER 30% IBF SUBSIDY

\*\*\* SG CITIZEN AGE 40 & ABOVE, AFTER 70% IBF SUBSIDY (CAP AT \$500)

RETIREMENT PLANNING PROCESS

# HAMBURGER WAY



[CLICK HERE](#)  
FOR REGISTRATION INFORMATION



## RETIREMENT PLANNING WITH CPF PROJECTION TOOLKIT

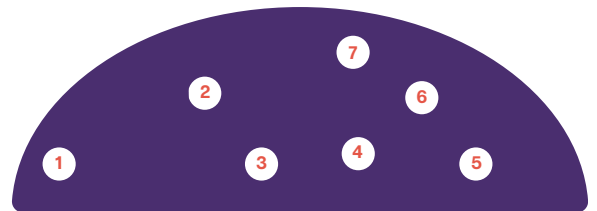
Master the **7.Point Retirement Planning Framework**, a proven system that guides you in achieving your clients' retirement goals with confidence.

Become an expert in leveraging CPF and CPF schemes to maximise retirement security, providing your clients with a solid financial foundation for their future.

Seamlessly integrate CPF, CPF LIFE, and available income streams with the intuitive **CPF Projection Toolkit**. Effortlessly handle complex calculations and projections, allowing you to focus on delivering tailored solutions

Create immediate value for your clients through visually compelling **CPF 55/65 Report** and **Retirement Planning Report**. Empower them to take informed action and make confident decisions.

Provide a clear path to your clients' retirement success with the **S.U.R.E. framework** ensuring they have a resilient and secure plan.



**CPF PROJECTION**  
TOOLKIT

**S.U.R.E**



# INSIGHTS FROM PARTICIPANTS



The trainer Kevin is extremely knowledgeable in what he does and he helps us to profoundly dig into the various aspects of retirement planning to assist clients to plan forward. He also uses frameworks to help students best understand concepts catered to our learning style so that we all benefit together. The course duration is also just nice, so nothing too heavy! He is awesome 🙌👩

**Dion Sng Jia Sin** ★★★★★

If you're someone who is into holistic planning and desire to make sure that your clients are ready for their retirement, this is the course for you! Not only are you prepared, you give your client that confidence too!

★★★★★ **Lim Shi Wei**



Kevin is a very generous and patient trainer who shares with us his knowledge on CPF and toolkit and concepts for planning. Well executed training rhythm for the course.

**Loo Ai Lian** ★★★★★



This is definitely a course all consultant should attend. It levels you up on the retirement planning knowledge and breach the gaps. Systems and tools are also extremely useful and relevant. It's also easy to understand.

★★★★★ **Jackson Koh**





# INSIGHTS FROM PARTICIPANTS



Very informative and practical session for all levels of practitioners. Kevin uses simple concepts and explains clearly how to make use of the CPF toolkit in a concise way. And he's knowledgeable in CPF terms and able to integrate & impart the knowledge to us. I'm excited to use this toolkit to level up my skills and value add to my clients and prospects.

**Florence Soon** ★★★★★

This is a really wonderful course where I've really learnt loads of useful information on weaving in CPF as part of retirement planning as well as approaches in engaging clients on the topic of retirement! Great delivery by Kevin too. He's super knowledgeable!

★★★★★ **Chung YiRen**



This programme is beneficial for new agents and experienced agents. There is a lot of information that has been made easier and concise for the participants. The toolkit is exceptionally useful for our presentations and for laying the groundwork with our clients, facilitating fruitful communication between us and our clients.

**Estella Tan** ★★★★★



I have previously attended a similar workshop too but I found the toolkit give too complicated to use whereas for Kevin's, it's very easy to understand and there's even a summary for clients who are not so into numbers.

Thank you Kevin!

★★★★★ **Michelle Lee**





# INSIGHTS FROM PARTICIPANTS



This course is so helpful, and I feel that I'm in a better position to help my clients to plan for their retirement. Kevin is very knowledgeable in the CPF area! I will definitely recommend this course to friends and colleagues in our industry!

**Wei Jia Ying** ★★★★★

Thank you Kevin for the great workshop! Engaging from start to finish and very useful as well. Clearly someone who is very experienced and knows his stuff. I look forward to using what I learned today to help service my clients better in future!

★★★★★ **Lum I-Zack**



The CPF Projection Toolkit is easy to use and comprehensive enough for clients to digest.

**Gillaine Kum** ★★★★★

As retirement planning is one of the essential financial needs that need to be addressed for every individual, I would recommend this course to fellow financial consultants to learn from Kevin. He delivers & trains well with his retirement tool kits and clear slides. The information will definitely benefit our prospects & clients!



★★★★★ **Natalie Choo**





# INSIGHTS FROM PARTICIPANTS

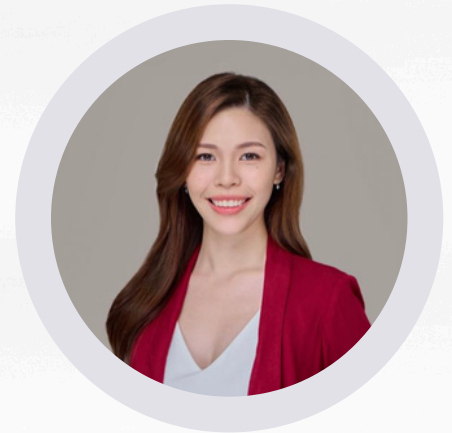


Kevin is a most patient and knowledgeable trainer. Retirement planning concepts and CPF information were made really easy to understand. Their toolkit was well-designed and a great help in our planning process. Highly recommended course to attend!

**Sophie Su** ★★★★★

The in-depth knowledge shared on retirement planning and CPF was extremely helpful! I have definitely gained insights and skills from this course! And I look forward to utilising the CPF Projection Toolkit on my clients to provide them with clarity and certainty on how their retirement life will look like.

★★★★★ **Bernice Leoh**



Thanks, Kevin, for patiently going through the toolkit and the specific concepts that are valuable and will help us with our business. I'm confident this will help us add value to our clients, and in turn, enable us to be referred to the ones they love too!

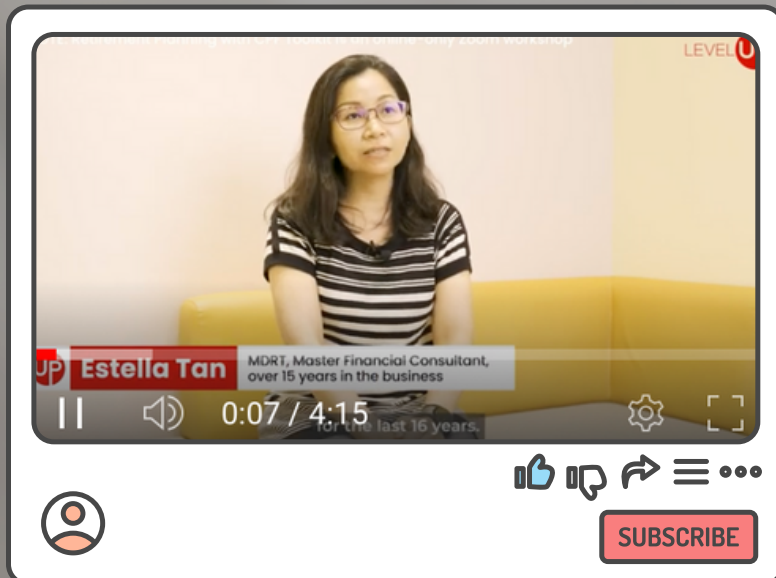
**Andrew Leow** ★★★★★

Kevin is very knowledgeable and has helped me have a better understanding of how to use CPF as a basis for helping clients with their retirement. The Toolkit will now be an invaluable resource in my presentations.

★★★★★ **Leonard Koh**



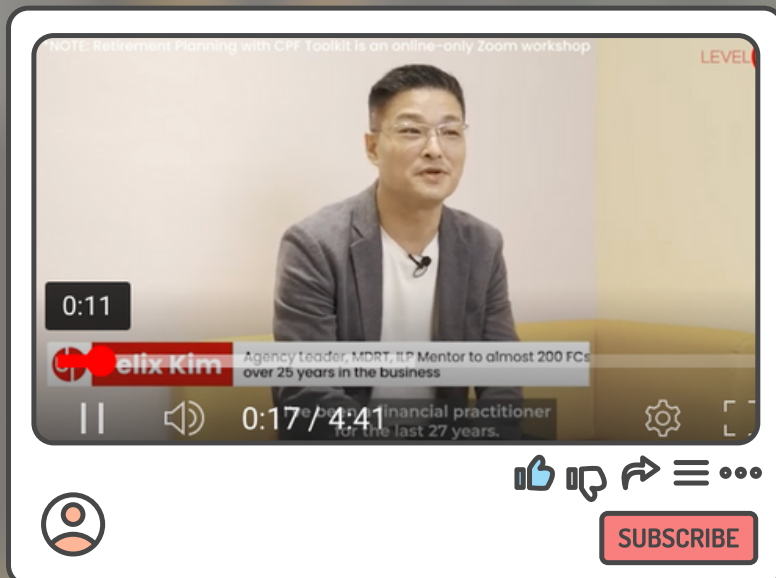
# VIDEO TESTIMONIALS



WATCH VIDEO

**ESTELLA TAN**

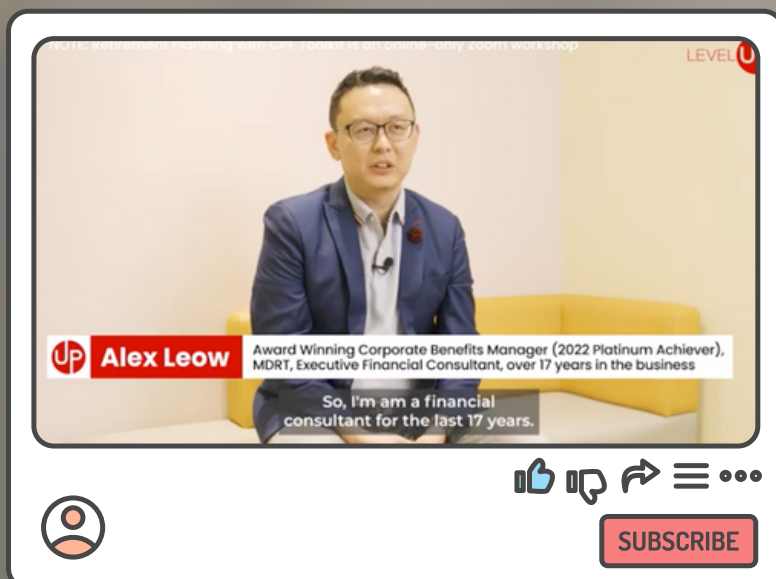
MDRT, Master Financial Consultant



WATCH VIDEO

**FELIX KIM**

MDRT, Agency Leader



WATCH VIDEO



**ALEX LEOW**

MDRT, Master Financial Consultant



# ENROL TODAY TO MASTER CPF FOR COMPREHENSIVE RETIREMENT PLANNING



<div style="text-align: center;">  <h2>ONLINE ZOOM</h2> <h3>RETIREMENT PLANNING WITH CPF PROJECTION TOOLKIT (SYNCHRONOUS E-LEARNING)</h3> <p>PROGRAMME CODE <b>TGS-2023039860</b></p> <p>ONE DAY PROGRAMME 0930 - 1730 HOURS</p> <p><b>FULL COURSE FEE : \$899</b></p> <p>NETT FEE AFTER IBF SUBSIDY <b>\$629.30** OR \$399***</b></p> </div>	<div style="text-align: center;">  <h2>CLASSROOM</h2> <h3>RETIREMENT PLANNING WITH CPF PROJECTION TOOLKIT (CLASSROOM)</h3> <p>PROGRAMME CODE <b>TGS-2023021869</b></p> <p>ONE DAY PROGRAMME 0930 - 1730 HOURS</p> <p><b>FULL COURSE FEE : \$1,000</b></p> <p>NETT FEE AFTER IBF SUBSIDY <b>\$700** OR \$500***</b></p> </div>
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**\*Financial Training Scheme (FTS)**

This course is recognised under the Financial Training Scheme (FTS) and is eligible for FTS claims subject to all eligibility criteria being met. Please note that in no way does this represent an endorsement of the quality of the training provider and course. Participants are advised to assess the suitability of the course and its relevance to his/her business activities or job roles.

The FTS is available to eligible entities based on the prevalent funding eligibility, quantum and caps. FTS provides 30% course fee subsidy support for direct training costs subject to a cap of S\$500 per candidate per course subject to all eligibility criteria being met.

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**KEVIN KOH CFP®**  
PRINCIPAL TRAINER

## POST COURSE SUPPORT

- ✓ Refresher Workshops
- ✓ Toolkit Updates
- ✓ Articles & Resources
- ✓ Telegram Community



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