



25TH SUMMER ASSOCIATE PROGRAMME BRIEF

EXPERIENTIAL EXTERNSHIP PROGRAMME

#FINDINGIKIGAI #25SAP





FOUNDER & PROGRAMME DIRECTOR

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Founder, Planners Inc | Founder, The Confidant Group

Background: CCHS(m) | VJC | RSAF Pilot | NUS FASS

- 23rd year in Financial Advisory
- Senior Director Top 10% in GEFA
- MDRT Court of Table Top 3% globally
- Top 1% Income Earner in Singapore

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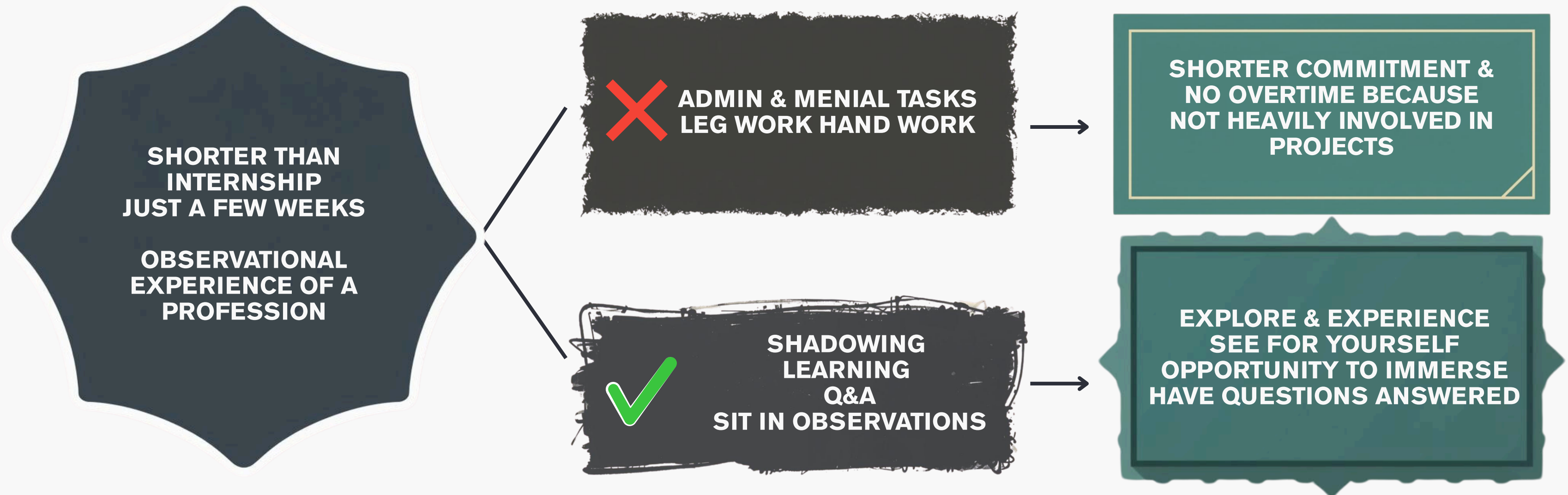


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WHAT IS AN EXTERNSHIP?

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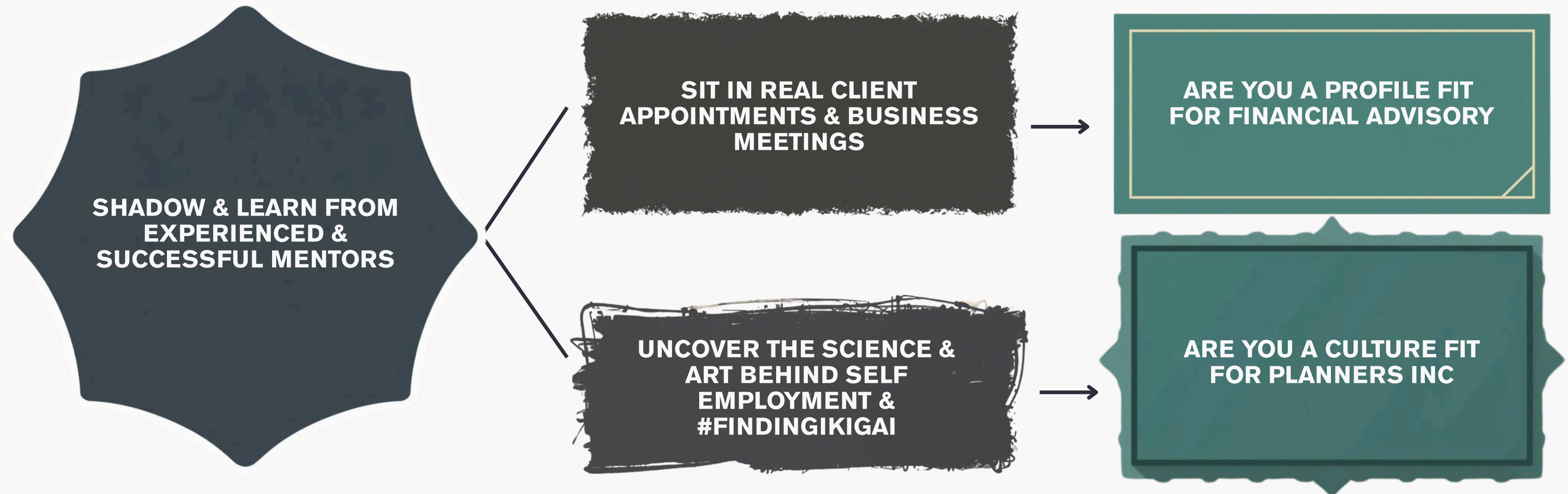
An externship is a brief-term, on-the-whole, observational experience designed to offer people a closer examination of a selected profession field. Unlike internships, which often involve hands-on tasks and lively participation in projects, externships involve shadowing professionals, looking at daily operations, and gaining huge photo information about the enterprise.

They provide an excellent opportunity for individuals to explore distinct career alternatives and make extra knowledgeable decisions about their careerpaths.

PLANNERS INC EXPERIENTIAL EXTERNSHIP PROGRAMME

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Through our immersive and experiential externship programme, we are scouting for Talented & Suitable Individuals that can be onboarded as apprentices and groomed to be future Directors, Named Partners & Top Performers of the firm, and industry.

This EEP is also our way of showcasing our People, Environment, Culture and Systems & Processes so as to debunk myths about financial advisory as a profession, as well as allow you to judge and decide if this work and this team is where you can excel in.

25 SAP PROGRAMME HIGHLIGHTS

6* WEEKS OF IMMERSIVE LEARNING

BATCH 1 COMMENCING END MAY
BATCH 2 COMMENCING END JUNE

Gain hands-on experience and clarity about your future through structured exposure to real-world financial advisory practice.

Build confidence and discover if this is your path and purpose.

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01 FINANCIAL ADVISORY AS A JOBSCOPE

What is the work all about?

What are the problems & pain points we help solve?

How do we prospect, acquire and serve clients?

Elements of successful client-advisor relationships

02 FINANCIAL ADVISORY AS A CAREER AND BUSINESS

How does self employment work as a FA?

How are we remunerated?

What is our Business Model? How do we scale?

Why is this business model sustainable, profitable and fun

03 PERSONAL & PROFESSIONAL DEVELOPMENT

How to discover your purpose & mission in life?

Where & How can you find your Ikigai?

How to hone & elevate professional skills such as persuasive presenting, communication, selling, leadership, business development, strategies & execution.

3 BIGGEST EXTERNSHIP TAKEAWAYS



#1 DISCOVERING YOUR BIG WHY

The two most important days of your life are the day you are born,
and the day you find out why

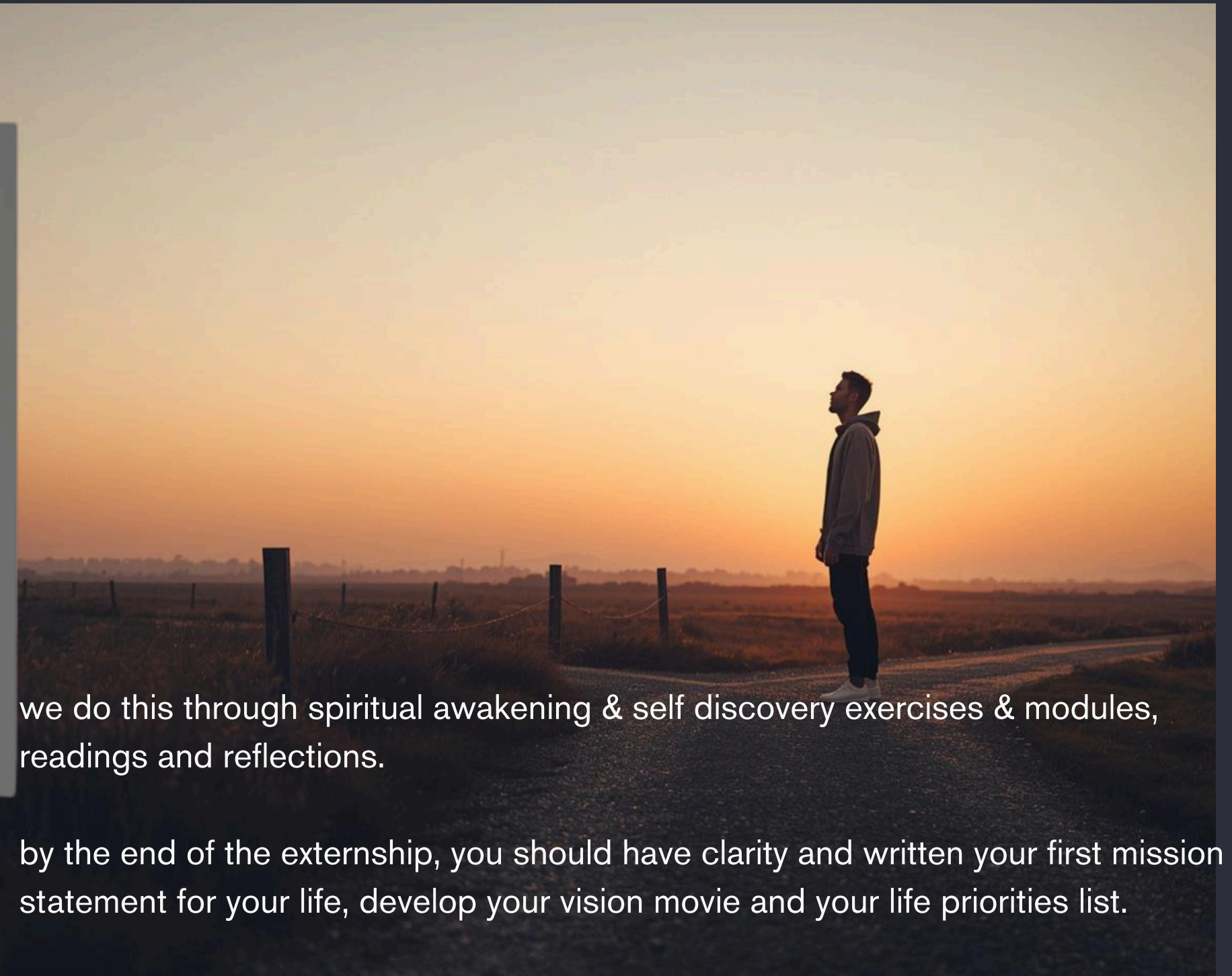
~ Mark Twain



we do this through spiritual awakening & self discovery exercises & modules,
readings and reflections.

by the end of the externship, you should have clarity and written your first mission
statement for your life, develop your vision movie and your life priorities list.

more importantly, you will be transformed from passive observer to active seeker
of your life purpose.





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#2 FINDING YOUR IKIGAI

Ikigai is the Japanese concept of finding your purpose — the intersection of what you love, what you're good at, what the world needs, and what you can be paid WELL for.

When these four elements align, you discover clarity, fulfillment, and direction in your career and life.



we do this through series of self discovery exercises including personality tests and deep reflections, and in so doing, helping you align with. your soul, conscience and core purpose.

we do this also through experience and showing you how you can serve people and human needs, and be indispensable and irreplaceable in the role that you play

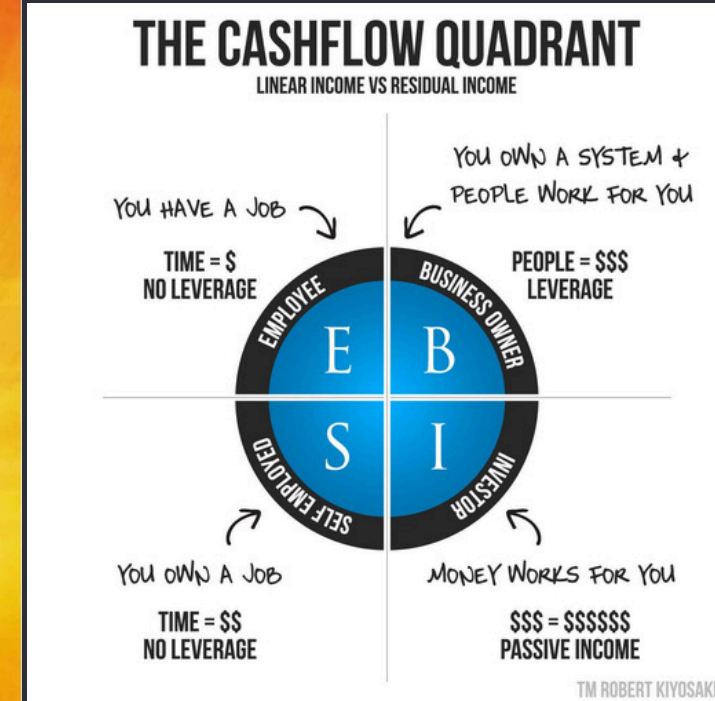
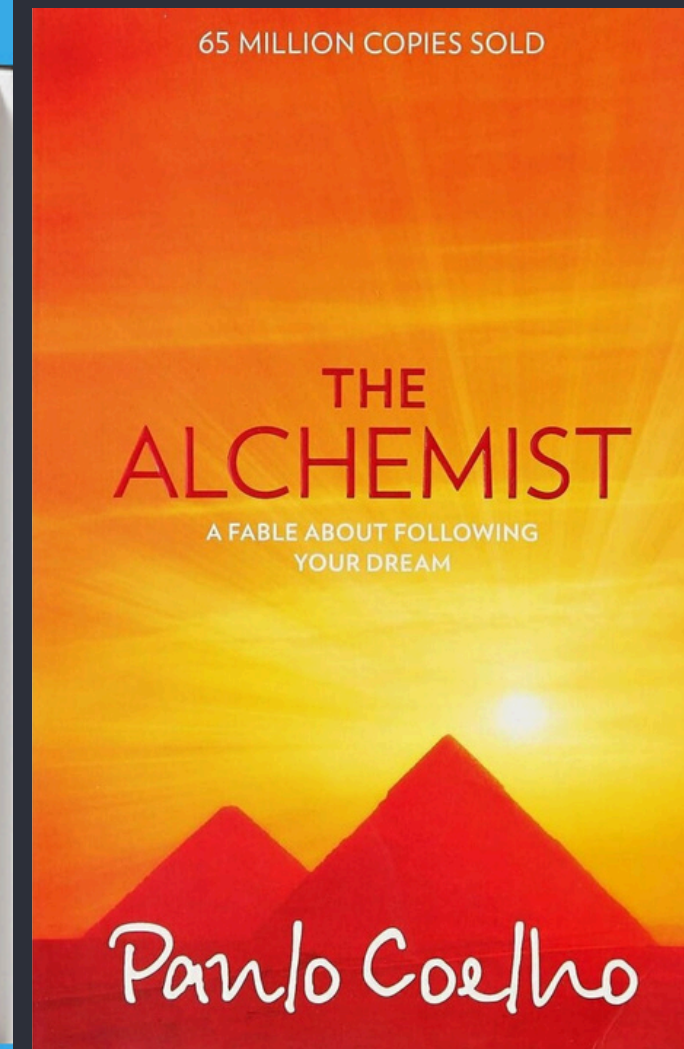
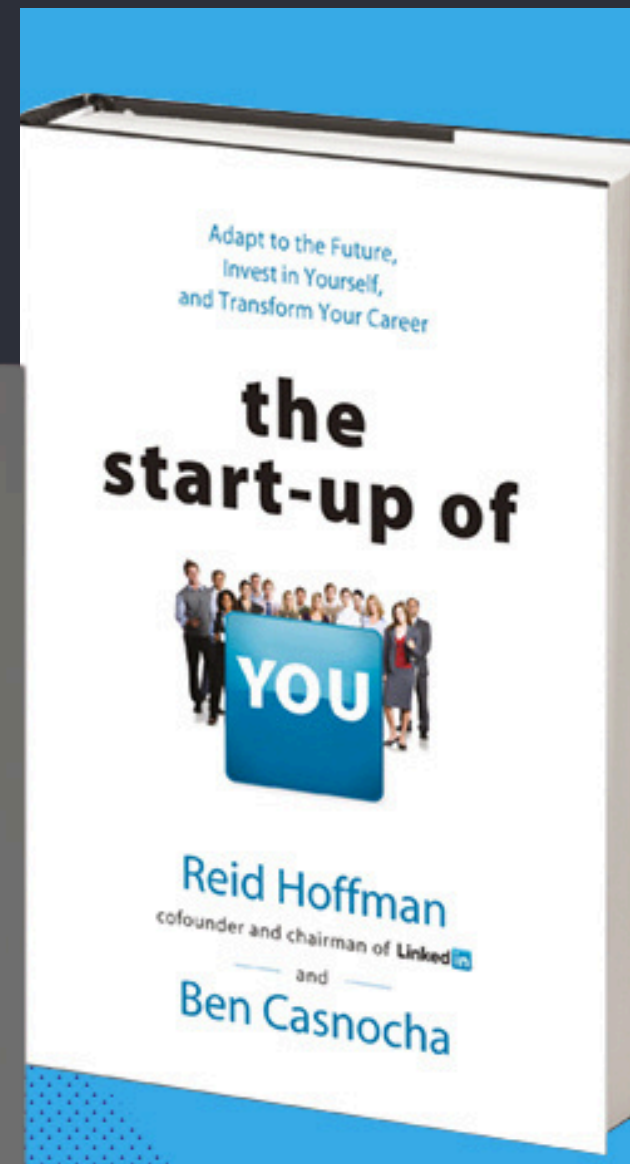
by the end of the externship, you should have clarity in how to pursue meaning and purpose, fun and fulfillment, success and satisfaction, and balance in your work & life

#3 DEFINING SUCCESS AT WORK & IN LIFE

You are in your Education & Identity Formation phases of your life and this phases took the past 12 to 18 years.

The next phases of your life - Working & Adulting phases - are going to span typically 20 to 50 years.

Being clear of what defines "Success" for you, at work and in life, will help you make better decisions in your career, money, family and play.



we do this through series of exposure to people, literature, experiences and codified knowledge about what this game of life (and career, and money) is all about - what drives people and behaviour, what are we seeking, have mental-emotional-physical fuel to go the distance.

to win at the game of life (and work, and money), we need first to understand the rules, the parameters and learn not just from textbooks, but also other people's mistakes and embark on our own self directed journey of growth and contribution.

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