2026

LEVEL UP

IBF ACCREDITED PROGRAMME

IBF - FINANCIAL TRAINING SCHEME (IBF - FTS)

RETIREMENT PLANNING WITH CPF PROJECTION TOOLKIT

CLICK HERE
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

CLICK HERE
FOR TRAINER PROFILE

RETIREMENT PLANNING WITH CPF PROJECTION TOOLKIT

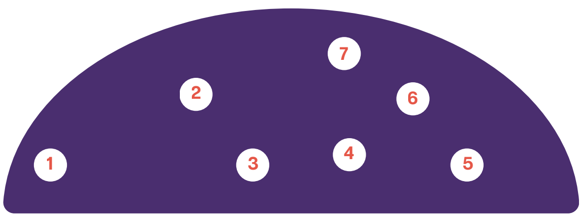
Master the **7.Point Retirement Planning Framework**, a proven system that guides you in helping your clients achieve their retirement goals with confidence.

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 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

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FOR REGISTRATION INFORMATION

LEVEL UP

IBF ACCREDITED PROGRAMME

IBF - FINANCIAL TRAINING SCHEME (IBF-FTS)

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

PROGRAMME CODE

TGS-2025060595

ONLINE ZOOM

ONE DAY PROGRAMME
0930 - 1800 HOURS

FULL COURSE FEE : $1,000

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

RETIREMENT PLANNING WITH CPF PROJECTION TOOLKIT (CLASSROOM)

PROGRAMME CODE

TGS-2025054621

CLASSROOM

ONE DAY PROGRAMME
0930 - 1800 HOURS

FULL COURSE FEE : $1,000

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

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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.

** SG CITIZEN BELOW AGE 40 OR SPR, AFTER **30%** IBF SUBSIDY
*** SG CITIZEN AGE 40 & ABOVE, AFTER **70%** IBF SUBSIDY (**CAPPED AT $500**)

LEVEL UP

WHAT TOP PRODUCERS SAY

Trusted by MDRT, COT, and TOT Producers and Agency Leaders

Jaslyn Ng
3x TOT | 5x COT | 8x MDRT

I signed up for Kevin's CPF course after hearing strong reviews from my FC. The CPF Projection Toolkit that Kevin developed is one of the most client-friendly tools I've seen. With just a few data points, it provides clarity in minutes.

The toolkit is plug-and-play, visually intuitive, and instantly helps clients understand where they stand and most importantly, next steps.

One success story: A client in her early 50s thought she was 'all set' for retirement. She had stacked multiple endowment plans and wanted to buy yet another one – a small plan for her daughter. I paused and asked her the golden question: Do you know how much you actually have for retirement, and how long that money will last you, including your CPF?

She went silent.

Then we mapped it all out: CPF balances, policy values, projected timeline. By the end of that conversation, she saw the gaps clearly and walked away with a 5-digit regular premium policy.

If you're a Financial Consultant who wants to go beyond the extra mile and create real clarity and impact for your clients, I would strongly recommend this CPF Retirement course.

Ryan Tan
5x MMDA | 6x MDA | 8x MDRT

I want to especially commend Kevin for putting together this impactful training and generously sharing his own kept secrets. His knowledge on CPF changes is both current and comprehensive, and the toolkit he created is simply brilliant.

This tool is a game-changer, enabling us to assist clients in mapping out their retirement with clarity. Personally, I've used it in all my retirement planning meetings, and clients love that they can see their numbers clearly. This opens the door to address any gaps while they're still economically active, giving them the best chance to secure their future.

Highly recommend that all FCs bring their clients through this process, it will be immensely beneficial for both your clients' retirement success and your own professional growth.

LEVEL UP

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 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**

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 ★★★★★

LEVEL UP

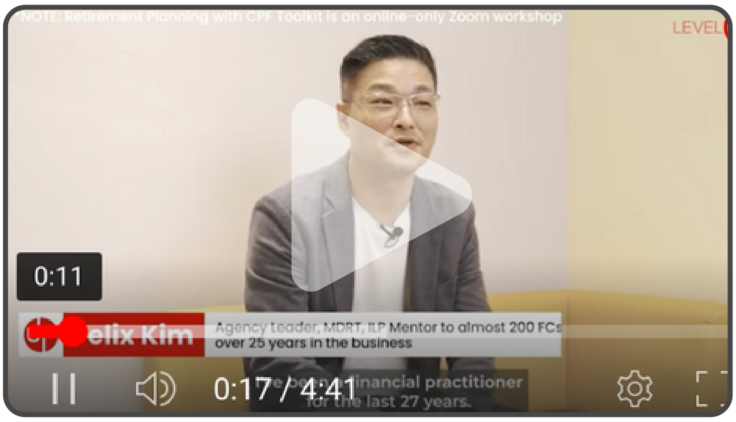
VIDEO TESTIMONIALS

SUBSCRIBE

"Makes retirement planning so much clearer for clients."

WATCH VIDEO

ESTELLA TAN
MDRT, Master Financial Consultant



SUBSCRIBE

"A toolkit every FC should learn to use."

WATCH VIDEO

FELIX KIM
MDRT, Agency Leader

SUBSCRIBE

"This immediately improved my client meetings."

WATCH VIDEO

ALEX LEOW
MDRT, Master Financial Consultant

ENROL TODAY
TO LEVEL UP YOUR CPF PLANNING EXPERTISE

Trusted by hundreds of Financial Representatives each year
to deepen retirement planning mastery.

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WHO SHOULD ATTEND

- ✓ Financial Consultants & Planners seeking CPF mastery for retirement planning
- ✓ New entrants building a strong CPF advisory foundation
- ✓ Experienced practitioners refining CPF strategies and applications
- ✓ Agency Leaders uplifting team capabilities and advisory standards
- ✓ Advisors guiding clients on CPF changes, CPF LIFE & retirement income planning

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KEVIN KOH CFP®
PRINCIPAL TRAINER

YOUR POST COURSE SUPPORT ECOSYSTEM

- **Refresher Workshops**
  Stay updated on CPF changes and application of the toolkits
- **Toolkit Updates**
  Get updated versions so your numbers are accurate and reliable
- **Articles & Resources**
  Receive content to help you answer CPF questions with clarity.
- **Telegram Community**
  A supportive community network to learn, ask, and grow together

VIEW 2026 COURSE SCHEDULE

www.levelupacademy.com.sg   info@levelupacademy.com.sg