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INTERNATIONAL FINANCIAL PLANNING ADVISORS CONFERENCE 2008



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THE NEW FRONTIERS OF FINANCIAL PLANNING

SUNWAY PYRAMID CONVENTION CENTRE • 22-24 FEBRUARY 2008

PROGRAMME

IFPAC is back and this time it's even bigger and better. Whether you are a financial practitioner or an investor, IFPAC aims to broaden your horizons with new outlook, techniques, tools and ideas in the financial planning industry. The event brings you quality programmes including discussions and talks by international speakers and key industry players. There is also an expo featuring financial and investment firms, showcasing their latest products as well as providing advisory services to visitors. Don't miss this opportunity to enhance your financial knowledge and hone your investment skills.

FRIDAY, 22 FEBRUARY (DAY 1)

- 8.00 am Registration of Delegates
 9.15 am Welcome Address by U Chen Hock, President of FPAM
 9.30 am Keynote Address & Launch by YBhg Dato' Zarinah Anwar, Chairman, Securities Commission Malaysia
 10.00 am Coffee Break & Tour of Expo by YBhg Dato' Zarinah Anwar
 10.30 am **Conference Session 1**
 The Art of Urgency – Creating Urgency in Your Clients Mind
Robert Jolles, President, Jolles Associates Inc, USA
 12.00 pm Luncheon by AmBank Group
 2.30 pm **Conference Session 2**
 Taking Your Practice to the Next Step
Shawn Brayman, President, PlanPlus Inc., Canada
 3.30 pm Tea Break
 4.00 pm **Panel Discussion** (with Q & A from the floor)
 The Evolving Industry Framework for Financial Planning
Moderator: P. Gunasegaram, Group Executive Editor, The Edge Communications Sdn Bhd
Panelists: Wong Sau Ngan, General Counsel, Securities Commission, Malaysia
 U Chen Hock, President, FPAM
 Mark Toh, Council Member, FMUTM
 Ng Lian Lu, President, LIAM
 Hizwani Hassan, Head, Organizational Development, EPF
 6.00 pm Evening Cocktail by Standard Chartered Bank

SATURDAY, 23 FEBRUARY (DAY 2)

Concurrent session with 2 topics per session

- 9.00 am **Concurrent Sessions 1**
 (i) Knowing Early and Enough Prevents Bank Runs
Jean Pierre Sabourin, CEO, Malaysia Deposit Insurance Corporation, Malaysia
 (ii) The Global Financial Outlook
Joseph Tan, Senior Strategist, Global Markets, Fortis Bank, Singapore
 10.00 am Coffee Break
 10.30 am **Concurrent Sessions 2**
 (i) Revisiting REITs as an Investment - A Regional Study
Lim Ye Jhen, General Manager Hektar Asset Management Sdn Bhd, Malaysia
 (ii) Opportunities and Challenges in Islamic Wealth Management : The Malaysian Experience
Mohd Willieuddin Lim, Director, Consumer Banking & Wealth Management, CIMB Islamic Banking, Malaysia
 11.30 am **Concurrent Sessions 3**
 (i) Evaluating Structured Investment Products
Foo Keah Keat, Director/Head of Derivatives & Structured Products, OSK Investment Bank Berhad, Malaysia
 (ii) Building & Managing a Successful Financial Planning Practice
Grahame Evans, Managing Director, Professional Investment Services, Australia

12.30 pm Luncheon by DiGi

2.00 pm **Concurrent Sessions 4**

- (i) Driving the Malaysian Economy - GLC Transformations and Iskandar Development Region
Wong Shu Hsien, Senior Vice President, Managing Director's Office, Khazanah Nasional Berhad, Malaysia
 (ii) Wealth Management & Family Office
Giles Gunesekera, Director/Head of Third Party Sales, Principal Global Investors, Australia

3.00 pm Tea Break

3.30 pm **Concurrent Sessions 5**

- (i) The Growth of the Takaful Industry
Keith Driver, Chief Executive Officer, HSBC Amanah Takaful, Malaysia.
 (ii) The Changing Needs of High Net Worth Clients
Kimmis Pun, Executive Director, An international Private Bank, Singapore

4.30 pm **Concurrent Session 6**

- (i) Beyond Monte Carlo Analysis
Shawn Brayman, President, PlanPlus Inc., Canada
 (ii) Leaving Your Legacy Through Charitable Planning
Chua Tia Guan, Executive Director, Great Vision Wealth Management, Malaysia.

5.30 pm Close

SUNDAY, 24 FEBRUARY (DAY 3)

Open to Public

10.00 am to 6.00 pm: **Financial Exposition with Free Concurrent Public Talks/Workshops**

Topics For Public Talks/Workshops includes:

1. **Wealth Accumulation**

- Economic Outlook
- Alternative Investments
 - a) REITs
 - b) ETFs
 - c) Structured Products

2. **Wealth Protection**

- a) Risks Management for SMEs
- b) Wealth Management For Family Business
- c) Medical and Health Insurance

3. **Wealth Distribution**

- a) Estate Planning
- b) Wills and Trusts
- c) Charitable Trusts

4. **Others topics**

- a) Health and Nutrition
- b) Financial Health Checks
- c) Information Workshops/Talks by BNM, EPF, SC, AKPK, PIDM & FMB

*The programme is accurate at the time of printing.
 The organizer reserves the right to change the topics/
 speakers in the interest of the conference.*

IFPAC 2008 CONFERENCE

THE SPEAKERS

ROB JOLLES

As one of the most sought after speakers on sales in the US, Rob Jolles was instrumental in creating, delivering and managing Xerox Corporation's highly touted customer sales training programs. A published author and president of Jolles Associates, Inc, his newest book, *Customer Centered Selling*, spent eight weeks at number one on the Business Best Seller List, over 100 weeks in the top 20, and named one of the top ten must read by Books, Etc. A paperback edition was released by Simon & Schuster recently.

SHAWN BRAYMAN

Shawn Brayman is the founder and president of PlanPlus Inc., a private Canadian company that has specialized in providing investment planning and financial planning solutions to financial advisors for the past 17 years. In September 2007, Shawn was presented the Financial Frontiers Award, a global research award by the Journal of Financial Planning and the Financial Planning Association for leading research in the field of financial planning. Shawn brings a unique combination of technical, business and financial planning knowledge to any audience.

GRAHAME EVANS

Previous to holding the position of Managing Director at Professional Investment Services, Grahame was CEO Investments for Tower Australia and Head of Corporate and Employee Benefits with AMP. At AMP he was responsible for Australia's largest company superannuation portfolio with over 33,000 employees and \$11 billion. Grahame was, at the age of 32, the youngest ever Australian to be appointed to the board of an Australian life insurance company and was recognised as one of Australia's leading experts on superannuation.

U CHEN HOCK

U Chen Hock is the General Manager of Personal Financial Services of HSBC Bank Malaysia Berhad. He started his career with HSBC and has gathered wide experience in corporate and consumer banking. In his current role, he has responsibility for the overall direction and growth of consumer banking business including credit cards and wealth management. U holds a Bachelor of Economics (Hons) degree and is also a Certified Financial Planner (CFP).

GILES GUNESEKARA

Giles joined Principal Global Investors Australia in 2006 and is responsible for growing and managing the firm's third party retail business in Australia and New Zealand. Previously, he was a state manager of retail sales at Merrill Lynch Investment Managers. Giles received his bachelor's degree in Commerce from Monash University and Master's in Applied Finance and Investment from the Financial Services Institute of Australia. Giles is a member of the Australian Institute of Training and development and an associate fellow of the Australian Institute of Management.

CHUA TIA GUAN

An accounting graduate from University Malaya, Chua Tia Guan worked at Arthur Andersen Private Client Services before joining Great Vision Advisory Group as its Head of Tax & Financial Planning. He is sought after by high-net worth individuals and long established business owners in designing and implementing their business succession plans. Currently, he is actively involved in the Associated Chinese Chamber of Commerce and Industry of Malaysia as the Head of Economic Survey Unit and the Deputy Chairman of the Commerce Committee.

P. GUNASEGARAM

P. Gunasegaram is Group Executive Editor of The Edge weekly business newspaper, for which he writes the "Question Time" column. He has some 30 years experience as a business journalist, investment analyst and in other posts in the financial services industry. His past positions in journalism include specialist writer at both the Business Times and The Star, and Editor of Malaysian Business magazine.

MARK TOH

Mark Toh is the Chief Executive Officer of Prudential Fund Management Berhad. He started his career in Prudential Assurance in 1976. In 1991, he joined a banking organisation to start up and manage a group of financial services companies. He left the company to rejoin Prudential in 2000. Mark is a member of the Board of Governors of the Financial Planning Association of Malaysia and a Council Member of the Federation of Malaysian Unit Trust Managers.

JOSEPH TAN

Joseph is a Senior Strategist for Fortis Bank SA/NV responsible for global markets research on Asian foreign exchange and interest rates. Prior to joining Fortis, Joseph was with a major British bank in the area of economics research on Southeast Asian economies. A CFA charter holder, Joseph speaks frequently at regional forums and roundtables organised by government bodies and think-tanks.

FOO KEAH KEAT

Foo Keah Keat has over 20 years of experience in the investment banking/securities industry, specialising in derivatives and structured products. Prior to his return to Malaysia, he spent 17 years with the derivatives teams of several international investment banks based in London, Tokyo, Hong Kong and Singapore. Among the positions he has held were as Head of Derivatives, Asia-Pacific ex-Japan with Banque Paribas (1993-96) and Head of Equity Financial Products Sales, Asia with ING Baring Securities (Hong Kong) (1996-98).

NG LIAN LU

Ng Lian Lu is the Chief Executive Officer of AmAssurance Berhad. He has some 23 years of experience in the insurance industry. He joined AmAssurance Berhad as the Chief Executive Officer in 2002. In addition to being the President of LIAM, Ng is also the Chairman of Malaysian Life Reinsurance Group Berhad. He is also the Immediate Past President of Malaysian Financial Planning Council (MFPC) and is the current Chairman of the Ethics and Compliance Board of MFPC.

JEAN PIERRE SABOURIN

Jean Pierre (JP) Sabourin is the Chief Executive Officer (CEO) of Perbadanan Insurans Deposit Malaysia (PIDM). He has unparalleled expertise in all aspects of deposit insurance and is very much in demand internationally. His assistance has been widely sought by other countries on establishing and improving their deposit insurance systems. In May 2002, he led the establishment of the International Association of Deposit Insurers and was elected its first Chair of the Executive Council and President, a position he held until the end of 2007.

HIZWANI HASSAN

Hizwani is a Senior General Manager with Malaysia's Employees Provident Fund (EPF). He is a member of the Malaysian Institute of Accountants and an associate of the Institute of Chartered Accountants in England and Wales. He graduated with a Bachelor of Science (Honours), majoring in Economics, from the London School of Economics, University of London. In October 2001, he joined the EPF as its Head of Corporate Services. Hizwani is currently Head of Organisation Development Division.

KIMMIS PUN

Kimmis Pun is a Senior Banker with a top Private Bank overseeing the ultra high net worth clients. With over 20 years of banking experience in the perspectives of asset protection, global investment and corporate finance, Kimmis is one of the key decision makers in the banking industry in Singapore. She is ever willing to share her immense banking knowledge and management experience and is a well known speaker at conferences and professional seminars on financial planning. She also teaches finance and management subjects at various universities and financial academies.



Rob Jolles



Shawn Brayman



Grahame Evans



U Chen Hock



Giles Gunasekara



Chua Tia Guan



P. Gunasegaram



Mark Toh



Joseph Tan



Foo Keah Keat



Ng Lian Lu



Jean Pierre Sabourin



Hizwani Hassan



Kimmis Pun

IFPAC 2008 CONFERENCE FORM

SUNWAY PYRAMID CONVENTION CENTRE • 22-24 FEBRUARY 2008

Yes! We are interested in attending the IFPAC 2008 Conference.

Participant 1 Mr Mrs Ms Others _____

Full Name as per I/C _____

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Organisation _____

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Participant 2 Mr Mrs Ms Others _____

Full Name as per I/C _____

I/C No. _____ FPAM M'ship No. _____

Designation _____ SC Licence No. _____

Organisation _____

Address _____

Tel(O) _____ H/P _____ Fax _____

E-mail _____

Participant 3 Mr Mrs Ms Others _____

Full Name as per I/C _____

I/C No. _____ FPAM M'ship No. _____

Designation _____ SC Licence No. _____

Organisation _____

Address _____

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Method of Payment

Fees: Member - RM650 Public - RM750

Cheque (payable to **Financial Planning Association of Malaysia**)

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Master Card Visa American Express

Credit Card No. _____ - _____ - _____

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Registration Closing - 6 Feb 2008

Enquiries:

Tel: 603-2095 7713 Fax: 603-2095 1713

For more information, visit www.fpam.org.my

Financial Planning Association of Malaysia

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50490 Kuala Lumpur

Cancellation is not allowed after acceptance of payment but substitute delegate is permitted if a notification is done in writing two weeks before the conference. However, non-members substituting for members will have to pay the difference in fees.