

## Conference Overview

INTERNATIONAL FINANCIAL PLANNING ADVISORS CONFERENCE 2008 (IFPAC 2008)

Sunway Pyramid Convention Centre  
February 22-24, 2008

The Financial Planning Association of Malaysia is organizing its 5<sup>th</sup> international conference, **IFPAC 2008** from February 22-24, 2008 at the Sunway Pyramid Convention Center, Petaling Jaya.

Aptly themed “The New Frontiers of Financial Planning”, the conference promises to share with you the latest trends and directions in the financial planning industry by presenting you with quality programs, international speakers, exposition and a wealth of new ideas.

Build on the success and experience of past 4 conferences, **IFPAC 2008** is expected to be much more exciting and grander. You will hear from many new voices presenting thoughtful and sometimes challenging ideas that are sure to expand your horizons and enhance your practice. FPAM is targeting an audience of 1,000 participants and a more highly-publicized event this time around - as the last conference’s excellent turnout would indicate the positive projection outlook.

**IFPAC 2008** participants will comprise a virtual “Who’s Who” of the key players on the financial services scene, including top corporate figures, professionals, business owners, asset managers and licensed financial planners driving the industry.

**IFPAC 2008** will also include an exposition (Expo) represented by a myriad of firms in the financial industry. This Expo which is also opened to the public will provide advisory services to visitors as well as showcase their latest and most innovative products.

**IFPAC 2008** is lining-up an impressive list of experienced speakers of international repute from around the globe. Diverse topics such as “Malaysia’s Potential as Islamic Wealth Management Hub, Regional and Global Financial and Investment Outlook, The Latest Financial Management Techniques and Tools, Alternative Investments such as Hedge Structured Funds awaits those who quest for knowledge.

One of the highlights would be a panel discussion on the “**The Evolving Industry Framework for Financial Planning**” with participation from the main regulatory and statutory bodies.

The program consists of the following elements:

**Friday, 22 February (Day 1)**

8.00 am Registration of Delegates  
9.15 am Welcome Remarks 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	<i>Coffee Break &amp; Tour of Expo by Guest of Honor /Press Conference</i>
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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	<i>Lunch Break</i>
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2.30 pm Conference Session 2

***Taking Your Practice to the Next Step***  
Shawn Brayman, President, PlanPlus Inc., Canada

3.30 pm	<i>Tea Break</i>
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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	<i>Evening Cocktail by Standard Chartered Bank</i>
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**Saturday, 23 February (Day 2) – Concurrent session with 2 topics per session**

9.00 am Concurrent Session 1

**(i) *Knowing Early and Enough Prevents Bank Runs***

Jeann 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	<i>Coffee Break</i>
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10.30 am Concurrent Session 2

**(i) *Revisiting REITs as an Investment - A Regional Study.***

Lim Ye Jhen, General Manager  
Hektar Asset Management Sdn Bhd, Malaysia

**(ii) *Malaysia's Potential as Islamic Wealth Management Hub***

Mohd Willieuddin Lim, Director, Consumer Banking & Wealth Management, CIMB Islamic Banking, Malaysia

11.30 am Concurrent Session 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 David Evans, Managing Director, Professional Investment Services, Australia

12.30pm	<i>Lunch by Digi</i>
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2.00 pm Concurrent Session 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 Gunsekera, Director/Head of Third Party Sales, Principal Global Investors, Australia

3.00 pm	<i>Tea Break</i>
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3.30 pm      Concurrent Session 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***

Kimnis 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	<i>Close</i>
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**Sunday, 24 February (Day 3)**

**Open to Public (9.00-5.00pm)**

Free Public Talks/Financial Health Checks

Networking/Exhibition Viewing

## **About FPAM**

FPAM was established in 1999 with the purpose to see to the proper development of the financial planning profession and industry.

It introduced and administers the CFP (Certified Financial Planner) certification programme with the aim of ensuring that the industry is served by professional, properly certified and ethical financial advisers. The CFP qualification is recognized by both the Securities Commission and Bank Negara for licensing purpose.

FPAM currently has 43 Charter and Corporate members and about 10,000 individual members, of which about 3,800 are fully Certified members. Its Charter and Corporate members are drawn from a wide cross section of the financial sector. They include many of the major foreign and local banks, unit trust companies, life insurance companies, trustee firms, security houses and financial planning firms. Its individual members are drawn from the ranks of these firms and also include those who are accountants, lawyers, members of the academia and the commercial sector.

FPAM is an affiliate of the Financial Planning Standards Board ([www.fpsb.org](http://www.fpsb.org)), an international body that owns and oversees the development of the CERTIFIED FINANCIAL PLANNER mark and certification program worldwide.

The Securities Industry Act 1983 requires any person who acts or represents himself as a financial planner to be licensed by the Securities Commission. The CFP qualification is one of the qualifications recognized by the Securities Commission for application for the Investment Adviser (Financial Planning) licence.

For more information log on to our website at: [www.fpam.org.my](http://www.fpam.org.my)  
FINANCIAL PLANNING ASSOCIATION OF MALAYSIA (FPAM)

## CHARTER MEMBERS

1. ING Insurance Berhad
2. Apex Investment Services Berhad
3. RHB Bank Berhad
4. Bank Simpanan Nasional Berhad
5. CIMB-Principal Asset Management Berhad
6. Citibank Berhad
7. Hong Leong Assurance Berhad
8. HWANGDBS Investment Bank Berhad
9. Manulife Insurance (Malaysia) Berhad
10. Public Mutual Berhad
11. Malaysian Assurance Alliance Berhad
12. OSK Investment Bank Berhad
13. Pacific Mutual Fund Berhad
14. Prudential Fund Management Berhad
15. SJ Asset Management Sendirian Berhad
16. Standard Chartered Bank Malaysia Berhad
17. CIMB Wealth Advisors Berhad
18. CIMB Investment Bank Berhad
19. AIA Company Limited
20. HSBC Bank Malaysia Berhad
21. RHB Unit Trust Management Berhad
22. Kenanga Investment Bank Berhad
23. Pheim Unit Trusts Berhad
24. OCBC Bank (Malaysia) Berhad
25. Affin Bank Berhad
26. Amanah Raya Berhad
27. Alliance Bank Malaysia Berhad
28. United Overseas Bank (M) Berhad
29. Asia Unit Trusts Berhad
30. MAAKL Mutual Berhad
31. Malayan Banking Berhad
32. ABN AMRO Bank Berhad
33. CIMB Bank Berhad

## CORPORATE MEMBERS

1. OSK-UOB Unit Trust Management Berhad
2. Deakin International Sendirian Berhad
3. Standard Financial Planner Sendirian Berhad
4. Rockwills Corporation Sendirian Berhad
5. Arrow Solutions (M) Sendirian Berhad
6. Money Concepts Malaysia Sendirian Berhad
7. Impact Independent Financial Advisory Sendirian Berhad
8. OSK Trustee Berhad
9. Great Vision Wealth Management Sendirian Berhad
10. A.D. Capital Sendirian Berhad