

# IFPC 2009

## ISLAMIC FINANCIAL PLANNING AND WEALTH MANAGEMENT CONFERENCE

*Malaysia – International Centre for  
Islamic Wealth Management*

**9 & 10 November 2009**

Sime Darby Convention Centre  
Bukit Kiara, Kuala Lumpur

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## BACKGROUND

The significant rise in the wealth of Islamic countries over the past four decades has provided tremendous opportunities for the growth and expansion of the wealth management industry to manage surplus funds in accordance with Shariah principles. Interestingly, the growth in the Islamic wealth management industry comes not only from affluent Muslims who desire to see their wealth preserved and enhanced within the framework of Shariah law, but equally from non-Muslims who view this as an ethical mode of investment and diversification.

This 2-day conference has been specifically designed to contribute to the development of Malaysia as an international centre for Islamic wealth management as well as to explore the opportunities, latest trends and developments in the Islamic financial planning and wealth management industry. This conference will enable participants to learn from key players and prominent speakers who will share some thought provoking and sometimes very challenging ideas and experiences

## PROGRAMME

### Key Topics

#### Industry Outlook

- Learn the latest updates and developments in Islamic financial planning and wealth management in Malaysia and the region and participate in discussion.

#### Business Operations of a Global Wealth Management Centre

- Understand key elements of a modern and mature wealth management centre and examine infrastructural models to suit the Malaysian regulatory framework and discover the phenomenal growth and development of Islamic wealth management

#### Growing Investment Portfolio Using Islamic Financial Products

- Learn from experienced practitioners their insights and experiences on structuring Islamic financial products and investment instruments.

#### Living in Economic Recession

- This session discusses wealth preservation components aimed at protecting accumulated wealth.

#### Establishing Malaysia as the International Centre for Islamic wealth management

- This session will look at Malaysia's leading position in Islamic finance and its potential in the wealth management industry. Panelists will also discuss the important role of advisory services in the development of the industry.

### DAY1 (Monday) 9 November 2009

#### Opening Session

- 8.30 am Registration
- 9.15 am Doa Recital
- 9.20 am Welcome Address  
**Wong Boon Choy**  
*President of FPAM*
- 9.30 am Keynote Address  
**Y.B. Senator Dato' Dr. Awang Adek bin Hussin**  
*Deputy Minister of Finance*
- 10.00 am Refreshments & Networking Session

- 10.30 am **Session 1: Plenary Session: Industry Outlook**  
Learn the latest updates and development of Islamic financial planning and wealth management in Malaysia and the region and participate in the discussion.  
(15 minutes for each panelist)

#### Moderator:

**Daud Vicary Abdullah**  
*Global Leader, Global Islamic Finance Group  
Deloitte Malaysia*

#### The Regulatory and Legal Framework for Islamic Financial Planning and Wealth Management

- The growth in the Islamic wealth management industry
- Building blocks for developing sound Islamic wealth management
- Emerging issues in Islamic FP and Wealth Management in the Middle East and Asia
- Prospects and challenges

#### Panelists:

**Mohd Radzuan A Tajuddin**  
*Head, Islamic Capital Market  
Securities Commission*

**Shariffuddin Khalid**  
*Director, Promotions Unit  
Malaysia International Islamic Financial Centre*

**Dr. Aimi Zulhazmi Abdul Rashid**  
*Chief Executive Officer  
Bank Islam Trust Company (Labuan) Ltd*

**Azman Ismail**  
*Chief Executive Officer  
Independent Islamic Financial Planners Sdn Bhd*

11.30 am Q & A Session

- 12.00 nn The Essence of Islamic Financial Planning
- The Shariah law and its implications
  - Practitioner's need for certainty of market
  - The industry as practice in different markets in emerging economies
  - IFP qualification

**Dr. Ismail Mohd @ Abu Hassan**  
*Shariah Adviser*  
Mayban Islamic Berhad

1.00 pm Lunch & Solat

### Session 2: Business Operations of a Global Wealth Management Centre

Understand key elements of a modern and matured wealth management centre and examine the best infrastructural models to suit the Malaysian regulatory framework and discover the phenomenal growth and development of Islamic wealth management.

- 2.00 pm Alternative Investments -  
Moving Away from Capital Protection

**Ali Abbas Zaidi**  
*Managing Director and Head of Islamic Markets*  
Maybank Investment Bank

- 2.45 pm The Worldwide Islamic Wealth Management Industry
- The scope for Islamic wealth management
  - The issues and challenges from a commercial and practical perspective

**Gul Khan**  
*Global Head of Wealth Management*  
HSBC Amanah, Dubai

- 3.30 pm Case Study of an International Wealth Management Centre – Singapore Experience

**Samer Taki**  
*Senior Vice President*  
Islamic Bank of Asia, Singapore

- 4.15 pm Q & A Session  
4.45 pm Refreshment  
5.15 pm End of Day One

## DAY2 (Tuesday) 10 November 2009

### Session 3: Growing Investment Portfolio Using Islamic Financial Products

Explore the crux of the Islamic financial planning and wealth management industry. Learn from experienced practitioners their insights and experiences on structuring Islamic financial products and investment instruments hence showcasing the attractiveness of this personalized financial services.

Moderator:  
**Wan Abdul Rahim Kamil Wan Mohamed Ali**  
*Consultant*  
Islamic Capital Market, Securities Commission of Malaysia

- 9.00 am Structuring Islamic Financial Products for the Global Market: Challenges and Innovation

**Badliyah Abdul Ghani**  
*Executive Director & Chief Executive Officer*  
CIMB Islamic Bank Berhad

- 9.30 am Building Wealth through Islamic Investment Instruments: Leading the Way in Malaysia

**Zainal Izlan Zainal Abidin**  
*Chief Executive Officer*  
i-VCAP Management Sdn Bhd

- 10.00 am Q & A Session  
10.30 am Refreshment

### Session 4: Living in Economic Recession

This session discuss about wealth preservation components and aim to protect accumulated wealth against every conceivable financial risks and threats. (20 minutes for each panelist)

Moderator:  
**Tang Beng Wah**  
*Chief Executive Officer*  
CIMB Wealth Advisors Berhad

- 11.00 am Managing Risks the Islamic Way –  
The Growth of the Takaful Industry
- Historical of Islamic Finance and Trade: Lessons learnt & the story behind it
  - The role of Takaful in complementing Islamic financial planning industry
  - Current trend and the way forward

**Zainudin Ishak**  
*Executive Director & Chief Executive Officer*  
HSBC Amanah Takaful

**Khaeruddin Sudharmin**  
*Managing Director*  
Motordata Research Consortium Sdn Bhd

Depositor Protection – Islamic Deposit Insurance  
**Md Khairuddin Haji Arshad**  
*General Manager, Insurance, Risk Assessment and Monitoring*  
Malaysia Deposit Insurance Corporation (PIDM)

- 12.00 nn Q & A Session  
12.45 pm Lunch & Solat

### Session 5: Education and Role of Professional Advisors

A critical area to be explored is education of the Advisers and with that the role they are expected to play.

- 2.15 pm The Role of Professional Advisors in the Islamic Wealth Management Industry

**Mahadzir Ahmad, IFP**  
*Islamic Finance Senior Consultant*  
HeiTech i-Solutions Sdn Bhd

- 3.15 pm Refreshments

### Session 6: Establishing Malaysia as the International Centre for Islamic Wealth Management

This session will look at Malaysia's leading position in Islamic finance and its potential in the wealth management industry. Panelists will also discuss the important role of advisory services in the development of the industry. (15 minutes for each panelist)

Moderator:  
**Gerald Ambrose**  
*Managing Director*  
Aberdeen Asset Management Sdn Bhd

- 3.45 pm The Evolution and Development of Islamic Banking Products

**Musa Abdul Malik**  
*Chief Executive Officer*  
HSBC Amanah Malaysia Berhad

**Mohd Nasiruddin Mohd Kamaruddin**  
*Chief Operating Officer*  
Standard Chartered Saadiq Malaysia

**Dato' Wan Ismail Wan Yusoh**  
*General Manager, Strategic Relations*  
Bank Islam Malaysia Berhad

**Roslan Abdul Razak**  
*Director, Training and Shariah Business Advisory Department*  
Islamic Banking and Finance Institute Malaysia

- 4.45 pm Q & A Session  
5.15 pm End of Conference



**IFPC  
2009**

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## **ISLAMIC FINANCIAL PLANNING AND WEALTH MANAGEMENT CONFERENCE**

### **REGISTRATION FORM**

- Fee : Normal - RM1,000 (FPAM Member), RM1,200 (Public)  
Fee includes conference materials, buffet lunch and refreshments.
- CPE Points : 10 SIDC CPE Points
- CE Points : 10 FPAM CE Points
- Instructions : Please fill up this form and fax to 03 - 2095 1713 or email to [muwu@fpam.org.my](mailto:muwu@fpam.org.my)
- Payment/Invoice : **By cheque** : Payable to FINANCIAL PLANNING ASSOCIATION OF MALAYSIA  
Address : Lot 16-02, 16<sup>th</sup> Floor, Block B, HP Tower, 12 Jalan Gelenggang,  
Bukit Damansara, 50490 Kuala Lumpur.
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[khairul.sabudin@ibfim.com](mailto:khairul.sabudin@ibfim.com) or call Encik Khairul Sabudin at **03-2031 1010** ext. **529**
- Terms : Registration is on a first come, first served basis. Confirmation is subject to payment before the  
conference. Walk-in participants will be admitted upon the availability of space. FPAM reserves the  
right to make changes to the program, speakers, dates, venue, etc, without prior notice.  
Cancellation is not allowed after acceptance of payment but substitute delegates are permitted if  
notification is done in writing two weeks before the conference. However, non-members  
substituting for members will have to pay the difference in fees.

#### **Yes! I am interested in attending the IFPC 2009 Conference.**

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