FPAM COURSE OUTLINE
(A SIDC CPE-approved course)

Title: **Wealth Creation and Asset Management**
Date: 19 October 2011, Wednesday
Venue: The Royale Chulan Kuala Lumpur
CPE / CE Points: 10 CPE Points / 10 CE Points
Instructor/s: Mr. Wong Loke Lim

Objective

Understanding tax assessments, investments and financial planning options is important for the financially aware; it should also be important for the financially unaware. With the financial services' industry becoming more sophisticated and pervasive, with ever-changing regulations and complex product designs, people need to be able to find their way through the financial jungle. The aim of the course is therefore substantially to increase awareness of possibilities and pitfalls associated with personal financial planning, acquainting participants with relevant investment vehicles, tax assessments and financial planning options for different circumstances.

Learning Outcome

By attending the course, participants will be able to:

1. Identify the key issues of retirement and outline the various financial options available to retirees
2. Evaluate investment risk preference
3. Establish an efficient portfolios consisting various investment products
4. Critically discuss issues involved in combining traditional with alternative asset classes
5. Formulate innovative personal tax solutions to minimise tax liabilities.

Time	Function/Paper Title
8.30 - 9.00 am	**Registration**
9:00 - 10:30am	**Planning for Retirement Lifestyle** • Analyse the needs and expenses, roadblocks and mistakes of retirement planning • Identify the retirement income sources • Case study - Life planning issues for retirement.
10:30 - 10:50am	**Coffee break**
10:50 - 12:45pm	**Risk Profiling and Prioritizing Individual Needs** • Establish personal investing to meet financial goals • Determine risk tolerance and develop personal investment policies • Explore the suitability of investment products - cash management, equities and bonds, trust funds and exchange traded funds. • Case study – Risk profiling
12:45 - 1:45pm	**Lunch break**

1.45 - 3.30 pm	**Efficient Portfolio Management** • Establish an optimum investment portfolio including the use of derivatives • Practice of personal asset allocation planning with a special emphasis on the basic tools, techniques and methodologies employed by financial planners. • Case study – Designing an investment portfolio
3.30 - 3.50 pm	**Coffee break**
3.50 - 5.00 pm	**Minimizing Wealth Dilution Through effective Tax Planning** • The impact of taxation on personal financial planning decisions. • Revisit relevant provisions of the Income Tax and Property Gains Tax regulations • Case study - Tax planning strategies for individuals
5.00 - 5.15 pm	Programme debrief

Profile of Mr. Wong Loke Lim

Loke Lim is an executive director and licensed fund manager of an asset management company, focusing on wealth management, private equity and corporate turnaround. Before this, he spent more than a decade in the financial services industry, specialising in capital market activities and fund management. His last held position was a General Manager in a financial institution.

Loke Lim is a Chartered Accountant, a Fellow Member of the Association of Chartered Certified Accountants and a Certified Financial Planner. He sits on the Board of Governors of the Financial Planning Association of Malaysia. He is the managing director of *i*-Biz Concept Sdn Bhd, a company that specialises in the design and delivery of training courses on all aspects of wealth management, private banking and investment management.

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	**Wealth Creation and Asset Management**
Speaker:	Mr. Wong Loke Lim
Date:	19 October 2011/ Wednesday [full day]
Venue:	The Royale Chulan Kuala Lumpur 5, Jalan Conlay 50450 Kuala Lumpur
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.15 pm
Fees:	**Early Bird Special; RM 1,000. (FPAM Member), RM 1,500. (Public)** **Payment by 1st October 2011.** Normal – RM 1,500. (FPAM member). RM 2,000. (Public) Fee includes seminar materials, buffet lunch and refreshments.
CE Points (FPAM): CPE Points (SIDC):	Ten (10) Ten (10)
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to aniza@fpam.org.my **by 1st October 2011 for early bird discount.**
Payment/Invoice:	**By cheque:** Payable to 'Financial Planning Association of Malaysia'. Address: Unit 1109, Block A, Pusat Perdagangan Phileo Damansara II, No 15, Jalan 16/11, off Jalan Damansara, 46350 Petaling Jaya, Selangor. **By credit card:** We will process and charge your credit card upon receipt of this form. This page serves as our official invoice. No further invoice will be issued.
Enquiries:	Send e-mail to aniza@fpam.org.my or call Cik Aniza at +603 7954 9500
Terms:	Registration is on a first-come-first-served basis. Confirmation is subject to payment before the course. Walk-in participant/s will be admitted on the basis of space availability. FPAM reserves the right to amend the program, speaker, date, venue, etc, without prior notice.

YES, PLEASE REGISTER ME!

Name:			
IC No.:		FPAM No. :	
Company& Address:			
E-mail:		Telephone:	
SC Licence / ERP No:		Mobile:	

Mode of Payment

By cash, please bank into **Maybank A/C 5140-7512-8677** and email or fax in bank-in slip
Cheque payable to **Financial Planning Association of Malaysia**. Cheque no.: Amount: RM
Charge my credit card: ☐Visa ☐Mastercard ☐Amex ☐Diners Credit card no.: Expiry date: Amount :
Early Bird Special – By 1st October 2011

Note: Please bring along a Financial Planning calculator/laptop for this course.

EMAIL / FAX TO +603 7954 9400