

FPAM COURSE OUTLINE

(A SIDC CPE-approved course)



Title: Shariah Perspective of Financial and Wealth Management
Date: 22 October 2011 / Saturday [Full day]
Venue: Dewan Berjaya, Bukit Kiara Equestrian & Country Resort, KL
CPE / CE Points: 10 CPE Points / 10 CE Points
Instructor/s: Mr. Mahadzir Bin Ahmad

Learning Outcome

By attending the course, participants will be able to:

1. Describe what Islamic financial Planning and wealth management is about
2. Relate his/her position in the financial industry vis-à-vis the regulatory structure
3. Compare between Islamic and conventional financial planning
4. Demonstrate to the Muslim clients what the Shariah concerns are in financial planning
5. Create awareness to the general public towards Islamic financial planning and wealth management

Time	Function/Paper Title
8.30 - 9.00am	Registration
9:00 - 9:45am	1.0 Financial Planning Industry in Malaysia 1.1 Islamic Finance and Financial planning movements 1.2 Licensing regime of SC and BNM
9:45 - 10:30am	2.0 Basics of Islamic Financial Planning 2.1 What is Financial Planning & Intro to the 6-steps process 2.2 Islamic worldview of financial planning & key differences to conventional
10:30 - 11:00am	Coffee break
11:00 - 11:30am	3.0 Islamic Financial Product and Services 3.1 Shariah Advisory in the development of financial products 3.2 Supporting services – Tax & Zakat advisory and Estate planner
11:30 - 12:45pm	4.0 Shariah Perspective of Financial Planning: Major Concerns 4.1 Risk Management and Takaful 4.2 Islamic Investment
12.45 - 2.00pm	Lunch break

2:00 - 3:30pm	4.0 Shariah Perspective of Financial Planning: Major Concerns 4.3 Zakat and Tax 4.4 Islamic Estate Planning and Waqf
3.30 - 4.00pm	Coffee break
4.00 - 5.15pm	5.0 Shariah compliant financial advisory 5.1 Mutual consent 5.2 Conflict of interest 5.3 Code of Ethics

Profile of Mr. Mahadzir Bin Ahmad

Mahadzir bin Ahmad, aged 46, is an Islamic finance analyst and a certified ISLAMIC FINANCIAL PLANNER™. He holds a BBA (Finance) from the University of Toledo, USA and an MBA (Islamic Banking and Finance) from the International Islamic University Malaysia. At present, he is attached to HeiTech Padu Bhd as Islamic Finance Consultant and is involved in business development and pre-sales activities to provide IT solutions to the Islamic finance industry. He is also pursuing a PhD in Islamic Finance at INCEIF, KL.

He was the Program Manager of Islamic Financial Planner (IFP) for Financial Planning Association of Malaysia (FPAM), a non-profit organisation with a mission to raise the standards of competency and ethical practice of qualified Financial Planners in Malaysia and to educate the public on the benefits of financial planning.

He was attached to FPAM for 4 years, since March 2005. His work at FPAM includes modules development, managing trainers, conducting classes, setting examinations, marketing, university liaison and other strategic developments of the IFP. The 6-module IFP qualification was recognized by the Securities Commission for financial planning license in April 2008.

Prior joining FPAM, he was engaged as a consultant by Yayasan Pelajaran MARA between Dec 2004 and March 2005. Among others, his services were to assist the management to review financial records and clear matters arising in relation to a RM25m-tax issue, YPM (Group) management accounts for FY 2004 and financial management procedures.

His career in the investment and financial services industry started when he took the challenge of being a Life Insurance Agent as his first job. Since then, more than 20 years have passed by and his experience covers a wide spectrum of being a financial professional. He performed investment research, share dealing, institutional sales and portfolio management from 1989 to 1996. He was involved with private equity investment between 1994 to 1996 while serving as Fund Manager for Yayasan Pahang's wholly-owned subsidiary whose assets under management then were RM60 million; of which, RM45 million was private equity in industries that include steel manufacturing, office furniture manufacturing, oil palm plantation and education services. He has undertaken many tasks as financial analyst to legal firms and as consultant to companies undertaking re-structuring, valuation, due diligence and fund raising exercises.

He regularly gives talk to private groups, teaches in the IFP program and writes in the Islamic financial planning column of Personal Money magazine and in the Global Islamic Finance Resources discussion group at LinkedIn.com. Also, he is adviser to Kolej Universiti Islam Antarabangsa Selangor (KUIS) for its Management and Muamalah faculty and to IKIP International College for its Islamic finance courses.

He can be contacted at mahadzirahmad@heitech.com.my and his articles and academic papers are available at <http://my.linkedin.com/in/mahadzirahmad> (click "View Full Profile").

This profile is dated 1 Jan 2011.

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	Shariah Perspective of Financial and Wealth Management
Speaker:	Mr. Mahadzir Bin Ahmad
Date:	22 October 2011 / Saturday [full day]
Venue:	Dewan Berjaya, Bukit Kiara Equestrian & Country Resort Jalan Bukit Kiara, Off Jalan Damansara, 60000 Kuala Lumpur
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.00 pm
Fees:	Early Bird Special; RM280 (FPAM Member), RM 350 (Public) Payment by 1st March 2011. Normal – RM 320 (FPAM Member), RM 380 (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:			
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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:	<input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/> Amex <input type="checkbox"/> Diners
Credit card no.:	Expiry date:
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Early Bird Special – By 1st October 2011

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