



Financial Planning Practice Clinic (FPPC)

"Knowledge is of no value unless you put it into practice." ~ Anton Chekhov

Introduction of Financial Practitioners Development Work Group

"What's next after obtaining the CFP title?", "How do I get started to practice financial planning?"

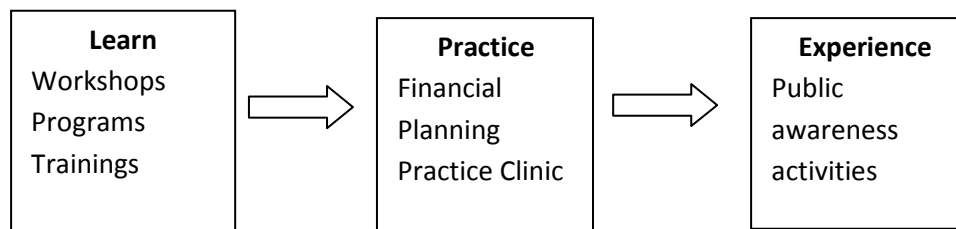
"I started my practice some years back but I don't seem to make any progress with it".

– These are some of the common concerns faced by current CFP practitioners and aspiring CFP practitioners whether in business or in workplace. There are many financial planning knowledge –based programmes available in the market but very few bridge knowledge with practice. CFP remains as a title for many holders and financial planning remains to be perceived as "financial product" by the public. Hence transferring the knowledge into practice for CFP members is essential to promote financial planning experience and thus raise the mark of CFP Profession among the public.

The objectives of the Work Group:

- To provide a platform for the CFP members to share and learn about practice
- To develop and grow CFP practitioners
- To reconnect and add values to the existing CFP members
- To grow and retain CFP members
- To provide a forum for the CFP professionals to implement their programs

The Framework of the Work Group:



Financial Planning Practice Clinic (FPPC)

FPPC is under the Practitioners Development Work Group's "Practice" framework. The focus is putting the 6-steps financial planning into practice. The key objectives of the FPPC are:

- to transfer knowledge into practice by having case studies and role plays
- to share best practices, success, challenges in practicing financial planning among members
- to increase the level of professionalism in practice of financial planning

Key Facilitators are the Committee Members of Practitioners Development Work Group:

1. Tang Wee Hen
2. Sharon Tan
3. Gavin Teoh
4. Catherine Khoo
5. Ng Chee Yong

Frequency & Duration : Monthly; 3 hour session
Venue : FPAM office
Dress : Business Casual
What to Bring : Journal Book to record your practice notes & Action Plans
Registration : By invitation only. Preference is given to participants who attended any of the Practice Development Series programs
Door Fee : RM 30 (FPAM members), RM60 (non-FPAM members); refreshment will be provided
For Invitation : To complete FPPC Form and email it to Ms Aniza Osman at aniza@fpam.org.my