FPAM COURSE OUTLINE
(A SIDC CPE-approved course)

Title: Master Smart Techniques in the Client Engagement Process to KICKSTART Your Practice Immediately
Date: 18 February 2012 / Saturday [Full day]
Venue: Dewan Berjaya, Bukit Kiara Equestrian & Country Resort, KL
CPE / CE Points: 10 CPE Points / 10 CE Points
Instructor/s: Ms. Carol Yip

Learning Objectives

This Workshop enables the financial planner to appreciate the application of psychology in the 6-steps financial planning process of understanding the client's needs, in a holistic manner.

Learning Outcomes

Participants will be able to apply the techniques of:

1. How to manage client's perception and expectation of your financial planning services, and establish a trusting relationship with you.
2. How to establish client's buy-in and work with you knowing that ownership of the financial plan belongs to him or her and not the financial planner.
3. How to identify client's emotional and psychological concerns.
4. How to use effective listening skills to identify client's needs – understanding the client's stories, the spoken and unspoken words by the client.
5. Helping client understand the success of financial plan implementation depends on how much the client is willing to work with you to achieve his or her financial and life goals and objectives.

Learning Methodology

Direct teaching, interactive exercises, role play, case studies, group discussions and presentations.

Time	Function/Paper Title
8:30 - 9:00 am	**Registration**
9:00 - 10:00 am	**Client's worldview of financial planning** Establish the worldview of client's financial situation, value system, life goals, belief system and family background.
10:00 -11:00 am	**Holistic approach to identify client's need** Diagnosing client's issues in the 6 Step Process: career, relationship, family and personal goals. Identify the gap in client's money management aspects.

11:00 - 11:15 am	**Coffee break**
11:15 - 1:00 pm	**Effective communication techniques** Learn and apply effective communication techniques to garner client's participation and ownership of the financial planning process.
1:00 - 2:00 pm	**Lunch break**
2:00 - 3:30 pm	**Trust building techniques with client** Techniques of building trust by asking the right questions and effective listening skills.
3:30 - 3:45 pm	**Coffee break**
3:45 - 5:00 pm	**Financial prescription according to client's needs** Matching client's financial and non-financial needs to appropriate financial advisory services and products.
5:00 - 5.30 pm	**Summary of learning points**

Profile of Ms Carol Yip

Carol Yip, Founder and CEO of Abacus For Money is a writer, speaker, personal financial advisor, trainer and coach. She is also a columnist for The Star, Bizweek, Smart Investor and Imagine Australia magazine.

Her advisory services comprises personal financial education project for government agencies, banks and education institutions. She designed a Certificate of Personal Finance programme, certified by City of Sunderland College, United Kingdom.

She holds an MBA (Finance with Distinction) University of Hull, UK, Bachelor's of Economics (Honours) Monash University, Certified Financial Planner and is presently completing her Masters in Counseling, specializing in financial therapy and counseling.

She has been the President of Monash University Alumni Malaysia since 2008. Carol has authored 'Smart Money-User', 'Money Rules' and 'Money Work Life', and has been keynote speaker for conferences in Asia Pacific, Australia and United States.

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	**Master Smart Techniques in the Client Engagement Process to KICKSTART Your Practice Immediately**
Speaker:	Ms. Carol Yip
Date:	18 February 2012 / 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 February 2012.** 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 February 2012 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

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Early Bird Special – By 1st February 2012

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