

Investment Planning in the Current Economic Climate

7 December 2013, Saturday

9.00am - 5.00pm

Evergreen Laurel Hotel, Gurney Drive, Penang.

SIDC/FPAM: 10 CPE/CE Points each FIMM: 8 CPD Points

**Early Bird Special, by 23rd Nov 2013,
RM150 [FPAM Member], RM250 [Public]**

Normal Price: RM180 [FPAM Member], RM280 [Public]

*including seminar materials, buffet lunch and refreshments

Learning Outcome

By attending this course, participants will be able to:

- Identify the basic concepts of asset allocation
- Customize an asset allocation model to a prospective client's requirement
- Identify the challenges or issues which will influence their investment return
- Identify the different type of investment styles and its pros & cons
- Explain the importance of Code of Ethics and Professional Responsibility

SPEAKER PROFILE

Wong Loke Lim is a member of the Board of Governors of Financial Planning Association of Malaysia (FPAM), where he is currently the Honorary Treasurer. He has spent more than twenty five years working in the banking industry and capital markets. He is a Certified Financial Planner professional, a Chartered Accountant and a Fellow member of the Association of Chartered Certified Accountants. He was the Licensed Representative/Chief Executive of a fund management company under the Capital Market Services Act 2007 and Director of a foreign-based hedge fund.

Registration

Name: _____

Company: _____

NRIC: _____ Contact No.: _____

Email: _____

FPAM No.(if applicable): _____

*pricing for FPAM-members is subject to membership being renewed for 2013.

For registration, please fill-up this slip and e-mail to PenangChapter@fpam.org.my or by fax 04-6453544. For further enquiries, kindly contact Ms. C K Sin at 04-6443468.

Payment Instruction:

1. Cheque payment. Make payable to FPAM Penang Chapter and bank in to RHB account 20713000012682, followed by email/ fax us the Bank's deposit slip and registration slip.
2. Internet Transfer. Make payment to RHB account 20713000012682 FPAM Penang Chapter, followed by email/ fax us the transaction slip and registration slip.

Payments must be made before 7 December 2013.