

FPAM COURSE OUTLINE

(A SIDC CPE-approved course)



Title: Investing in Alternative Investments (A.I)
Date: 30 October 2014 / Thursday [Full day]
Venue: Dewan Berjaya, Bukit Kiara Equestrian & Country Resort, KL
CPE/CE/CPD: 10 CPE Points / 10 CE Points / 8 CPD Points
Instructor/s: Mr. Chris Gan

Learning Outcome

By attending the course, participants will be able to:

1. Discuss what alternative investments are, and understand their basic characteristics compared to traditional investments such as unit trust funds, and others.
2. Identify the major classes of alternative investments such as hedge funds, private equity, managed futures, structured products and real estate.
3. Analyse the risk and return involved with these alternative investments vis-à-vis traditional investments.
4. Explain to clients, the differences between alternative investments vs. traditional investments which include parameters such as: performance objectives, leverage, market returns correlation, liquidity and fees.

Time	Function/Paper Title
8:30 - 9:00am	Registration
9:00 - 9:30am	An introduction to what is Alternative Investments <ul style="list-style-type: none"> • An overview of Alternative Investments (A.I) which are not new or obscure investments
9:30 - 10:30am	What are Alternative Investments <ul style="list-style-type: none"> • An overview of Alternative Investments (A.I) which are not new or obscure investments • Discuss the characteristics of A.I • What are the major classes of A.I – real estate, structured products, managed futures, hedge funds and private equity • Compare traditional investments vs. A.I
10:30 - 11:45pm	Coffee break

11:45 - 1 1:30pm	Hedge Funds <ul style="list-style-type: none"> • What are hedge funds? • Why invest in hedge funds? • Who invests in hedge funds – profile of investors • What are the hedge fund strategies? • Growth in the hedge funds market with focus on Asia • Describe the risk return of different strategies • How are hedge funds structured and the fees involved
11.30 - 1.00pm	Private Equity? <ul style="list-style-type: none"> • What's private equity (PE)? • Brief introduction to PE and its subclasses of investing; venture capital, leveraged buyouts (LBOs), mezzanine financing, & distressed debt. • Why invest in PE? Its risk-return profile. • What should investors need to know before investing in PE
1:00 - 2:00pm	Lunch break
2:00 - 3:30pm	Structured Products <ul style="list-style-type: none"> • What are structured products and also other types of A.I including managed futures? • Why should you invest in structured products? • What you need to know before you invest in structured products,
3:30 - 3:45pm	Coffee break
3:45 - 5:00pm	How to structure and market Structured products <ul style="list-style-type: none"> • The different types of structured products available and their risk-returns • How do we structure these products, and the effective marketing of structured products to HNWI clients
5.00-5.30pm	Other Types of Alternative Investments <ul style="list-style-type: none"> • What are the other types of Alternative Investments? • Non-mainstream assets such as art, wine, collectibles, • Exotic structures for investing in assets such as luxury watches and fine wine. • Investing in Life Settlements.

Profile of Mr. Chris Gan Choon Hian

Gan Choon Hian has many years of experience in investments, having also worked as an investment analyst early on in his career, and also as a corporate consultant. He is associate trainer of i-Biz Concept Sdn Bhd and speaks regularly on topics relating to capital markets. He has spent the last few years specialising in the area of wealth management and structured investments with two local banks.

In addition, he has lectured on investments and finance at two established universities: in New Zealand (Lincoln University) and Australia (Monash University, Sunway campus). As a regular columnist for the Edge's Personal Money magazine from 2000 – 2004, he contributed to educating the investing public on investment techniques. He has written numerous articles on unit trusts and investing, which have been published extensively in professional journals and publications such as UT Today, The Edge Weekly, and 4Es. He has also the author of four books: 'How to Sell Unit Trust and Why People Buy', 'What You Need to Know About Structured Products' and "Getting Started in Investment: A Smart Guide", and "Silver: What You Need to Know to Get Started". He holds a Bachelor of Commerce (Honours) Degree in Finance and Applied Econometrics

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	Investing in Alternative Investment (A.I)
Speaker:	Mr. Chris Gan
Date:	30 October 2014 / Thursday [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 – 5.30 pm
Fees:	Early Bird Special; RM 280 (FPAM Member), RM 400 (Non-members) Payment by 17th October 2014. Normal – RM 320 (FPAM Member), RM 450 (Non-members) Fee includes seminar materials, buffet lunch and refreshments.
CE Points (FPAM):	Ten (10)
CPE Points (SIDC):	Ten (10)
CPD Points (FIMM):	Eight (8)
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to aniza@fpam.org.my by 17th October 2014 for early bird discount.
Payment/Invoice:	By cheque: Payable to ‘Financial Planning Association of Malaysia’. Address: Unit 305 , Block A, Phileo Damansara I, 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:	
Contact Person:		Telephone:	

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:
Amount :	
Early Bird Special – By 17th October 2014	

EMAIL: aniza@fpam.org.my / FAX: +603 7954 9400