

# FPAM COURSE OUTLINE

## (A SIDC CPE-approved course)



**Title:** Estate Planning for Muslims & Non-Muslims and Benefits of Setting up Hibah / Trust  
**Date:** 21 May 2016 / Saturday [Full day]  
**Venue:** Hotel Grandis, Kota Kinabalu, Sabah  
**CPE/CE/CPD:** 10 CPE Points / 10 CE Points / 8 CPD Points  
**Instructor/s:** Ms. NurSabrina Soon Binti Abdullah

### Learning Outcome

By attending the course, participants will be able to:

1. Define and describe the basics of a Will and a Trust for both Muslims and Non-Muslims
2. Identify and differentiate Wills and Trust for both Muslims and Non-Muslims
3. Identify the benefits of writing a Will and a Trust for both Muslims and Non-Muslims
4. Identify the different tools to advise clients on Estate Planning and Business Succession Planning

Time	Function/ Paper Title
8:30 - 9:00 am	<b>Registration</b>
9:00 - 10:30 am	<p><b>What is Estate Planning?</b></p> <ul style="list-style-type: none"> <li>• The various instruments you can use for Estate Planning               <ul style="list-style-type: none"> <li>- Wills</li> <li>- Trust</li> <li>- Power of Attorney</li> </ul> </li> </ul> <p><b>What and How do you write a Will?</b></p> <ul style="list-style-type: none"> <li>• Legal Implications of Will</li> <li>• Benefits of Writing a Will</li> </ul> <p><b>Q &amp; A</b></p>
10:30 - 10:45 am	<b>Coffee break</b>
10.45 – 11.30	<p><b>What is Islamic Estate Planning?</b></p> <ul style="list-style-type: none"> <li>- Wasiyyah</li> <li>- Hibah</li> <li>- Amanah</li> </ul> <p><b>Q &amp; A</b></p>

11.30 – 1.00 pm	<p><b>What is Islamic Estate Planning?</b></p> <ul style="list-style-type: none"> <li>- Wasyyah / Islamic Will</li> <li>- Hibah</li> <li>- Amanah</li> </ul> <p><b>Faraid Distribution</b></p> <p><b>Q &amp; A</b></p>
1:00 - 2:00 pm	<p><b>Lunch break</b></p>
2.00 – 3.30 pm	<p><b>What is a Trust and how do you set up a Trust?</b></p> <ul style="list-style-type: none"> <li>• Legal implications of Trust <ul style="list-style-type: none"> <li>- Revocable</li> <li>- Irrevocable</li> </ul> </li> <li>• Benefits of Setting Up a Trust <ul style="list-style-type: none"> <li>- Preservation</li> <li>- Distribution</li> <li>- Protection</li> <li>- Succession Planning</li> </ul> </li> </ul> <p><b>Q &amp; A</b></p>
3.30 – 3.45 pm	<p><b>Coffee break</b></p>
3.45 – 5.00 pm	<p><b>Various Trust For Various Purposes</b></p> <ul style="list-style-type: none"> <li>• Private Trust</li> <li>• Charitable Trust</li> <li>• Investment Trust</li> <li>• Insurance Trust</li> <li>• Business Succession Trust</li> <li>• Declaration of Trust</li> </ul> <p><b>Estate Planning</b></p> <ul style="list-style-type: none"> <li>• Difference between Will and Trust</li> <li>• Difference between Testamentary and Living Trust</li> <li>• Ways of Estate Planning by combining Wills and Trust in the Planning</li> </ul> <p><b>Q &amp; A</b></p>

***Profile of Ms.NurSabrina Soon Binti Abdullah***  
**NSS Advisory Services**

Sabrina is a consultant of her own advisory company. She gives professional advices to high network individuals to assist them to set up their Estate Planning, Trust Planning as well as Business Succession Planning for Muslims and non Muslim individuals. A few of her many clients that she has structured their Estate Planning and Private Trust are 'Tan Sri Dato' Sri Paduka Lim Kok Wing' (the founder of 'Limkokwing University') and Tan Sri Datuk (Dr) Hj Mustapha Kamal (the founder of 'Emkay Group of Companies').

She has 23 years of working experience in both local and international trustee companies. She was a Director with CIMB Trustees Services and Associate Director with RHB/ OSK Trustees Services. She was also the Senior Manager with HSBC (Malaysia) Trustee Berhad for 18 years. She was dealing with both private and corporate clients. She was in charge of Retirement Schemes, Bonds, Escrow and Stakeholders for Corporate Clients. She dealt with Estate Administration and Private Trust for individual

clients. Her clients ranges from Corporate clients such as Nirvana Memorial Park Malaysia and Nilai Memorial Park to high networth Individual Clients. She also dealt with Estate Administration, being the executor or administrator of deceased estates.

Prior to her attachement to HSBC (Malaysia) Trustee Berhad, she was with HSBC Bank Malaysia Berhad for 10 years and was attached to Treasury, Credit and Operations. She also conducts training for insurance life planners, financial planners and gives presentations to the public.

Sabrina holds a Degree in Banking and a Diploma in Accounting.

## CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	<b>Estate Planning for Muslims / Non-Muslims and the Benefits of Setting up Hibah / Trust</b>
Speaker:	Ms. NurSabrina Soon Binti Abdullah
Date:	21 May 2016 / Saturday [ full day ]
Venue:	Hotel Grandis, Kota Kinabalu, Sabah
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.00 pm
Fees:	<b>Early Bird Special; RM 300. (FPAM Member), RM 400. (Non-members) Payment by 1st May 2016.</b> Normal – RM 350. (FPAM Member), RM 450. (Non-members) Fee includes 6% of GST, seminar materials, buffet lunch and refreshments.
CE Points (FPAM): CPE Points (SIDC): CPD Points (FIMM):	Ten ( 10 ) Ten ( 10 ) Eight ( 8 )
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to <a href="mailto:aniza@fpam.org.my">aniza@fpam.org.my</a> <b>by 1st May 2016 for early bird discount.</b>
Payment/Invoice:	<b>By cheque:</b> 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. <b>By credit card:</b> 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 <a href="mailto:aniza@fpam.org.my">aniza@fpam.org.my</a> 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:	
Email:		Fax:	

### Mode of Payment

By cash, please bank into <b>Alliance Bank A/C 1210 9001 005 6049</b> and email or fax in bank-in slip	
Cheque payable to <b>Financial Planning Association of Malaysia (Sabah).</b>	
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 :	
<b>Early Bird Special – By 1<sup>st</sup> May 2016</b>	

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