CE COURSE OUTLINE

(A Securities Commission CPE-accredited course)

Title: **Preparing an Estate Plan**
Date: 21 January 2017 / Saturday [Full day]
Venue: Bilik Kiara, Kelab Golf Perkhidmatan Awam (KGPA), Bukit Kiara, KL
CPE/CE/CPD: 10 CE Points / 10 CE Points / 8 CPD Points
Instructor/s: Mr. Azhar Iskandar Hew

Learning Outcome

By attending the course, participants will be able to:

1. Identify suitable estate planning instruments and features of each instruments to be used for each of the cases
2. Analyze the different estate planning instruments involved, its advantages and disadvantages
3. Explain the differences in each of the estate planning instruments to be used and why it is being used for a particular case
4. Understand and analyze the information given by the client for an estate plan to be drawn up
5. Identify the funding requirements for an effective estate plan to be implemented

Time	Function/Paper Title
8.30 - 9.00 am	**Registration**
9:00 - 9:30am	**Why is there a need to prepare an Estate Plan?** • This session is to establish the importance of estate planning and the common problems faced by family members where is no proper estate plan
9:30 - 10:30am	**Common estate planning instruments for Muslims and non-Muslims** • This session explains briefly on the common instruments such as will, trust, nomination, assignment, hibah, harta sepencarian contract and power of attorney
10.30 - 10.45am	**Coffee break**
10:45 - 1:00pm	**Usage and limitations of Will, Trust, Nomination, Assignment, Hibah and Harta Sepencarian Contract and Power of Attorney** • This session explores the usage and practical limitations of the common instruments • Various examples will be given to enable the participants to understand the usage of the instruments during the Case Study of Mr. Ho Yow Chin
1:00 - 2:00pm	**Lunch break**

2:00 - 3:30pm	**Case Study of Mr. Ho Yow Chin** The participants are required to go through the facts of Mr. Ho including the value of his assets, liabilities, debts and funding requirements for a discussion on preparing his estate plan
3:30 - 3:45pm	**Coffee break**
3.45 - 5.00pm	**Case Study of En. Ramli** The participants are required to go through the facts of En Ramli including the value of his assets, liabilities, debts and funding requirements for a discussion on preparing his estate plan

Profile of Mr. Azhar Iskandar Hew

He is currently the Deputy Chief Executive Officer of Rockwills Trustee Berhad and Director of Rockwills Advisory Services Sdn Bhd (a licensed financial planning company by Securities Commission). He has more than 19 years' experience in the estate planning industry as a will & trust specialist, trainer and conference speaker. Over the years he has trained more than 10,000 people primarily from leading financial institutions and life insurance companies as well as financial planners in Singapore.

His current scope of work includes advising on legal aspects and compliance and advisory matters regarding Estate Planning and Private Trust services. He contribute articles regularly to various financial planning magazines on the area of Estate Planning and Private Trust. He is a lawyer by training from the University of London and is a member of the Society of Trust and Estate Practitioners (STEP).

He is an approved Securities Industry Development Centre (SIDC) facilitator on the area on estate planning and a Certified Financial Planner course facilitator at KDU Management Development Centre Sdn Bhd (KMDC).

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	**Preparing an Estate Plan**
Speaker:	Mr. Azhar Iskandar Hew
Date:	21 January 2017 / Saturday [full day]
Venue:	Bilik Kiara, Kelab Golf Perkhidmatan Awam (KGPA) 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; RM 300 (FPAM Member), RM 425 (Non-members)** **Payment by 13th January 2017.** Normal – RM 340 (FPAM Member), RM 480 (Non-members) Fee includes 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 aniza@fpam.org.my **by 13th January 2017 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:	
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Contact Person:		Telephone:	

Mode of Payment

By cash, please bank into **Alliance Bank A/C 1210 9001 0005 395** and email or fax in bank-in slip
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