

Financial Planning Conference 2017

Life's Better with a Plan (for Consumers)

FREE EVENT

11 March 2017, Saturday, 9am – 5 pm

NTUC Auditorium

Guest-of-Honour: Mr Patrick Tay Teck Guan
Member of Parliament
Assistant Secretary-General, NTUC

Time	Description
8.30am – 9.15am	Registration
9.00am – 9.15am	Arrival of Guest-of-Honour
9.15am – 9.45am	Welcome Speeches by <ol style="list-style-type: none">Mr Joseph Kwok, President, Financial Planning Association of SingaporeMr Patrick Tay, Assistant Sec-Gen, NTUC (Guest-of-Honour)
9.45am – 10.05am	Session 1 Topic: What is Financial Planning? <ul style="list-style-type: none">Definition & Importance of Financial Planning <u>Guest Speaker:</u> Mr Gary Harvey, CEO, Nexus Financial Services Pte Ltd
10.05am – 10.25am	Session 2 Topic: What is Financial Planning? <ul style="list-style-type: none">What do you need to do before meeting a financial planner? & why is this important? <u>Guest Speaker:</u> Mr Rick Tan, Director, PIAS
10.25am – 10.40am	Short Break
10.40am – 11.00am	Session 3 Topic: How to choose a financial planner / advisor <u>Guest Speaker:</u> Mr Joseph Kwok, President, Financial Planning Association of Singapore
11.00am – 11.30am	Session 4 Topic: Know What the Lenders Know About You. Understand the importance of knowing your personal credit information <u>Guest Speaker:</u> Ms May Tan, Credit Bureau (Singapore) Pte Ltd
11.30am – 12.00pm	Session 5 Topic: CPF & You <u>Guest Speaker:</u> Mr Soh Chin Heng, Deputy CEO, CPF

Time	Description
12.00pm – 12.30pm	<p>Session 6: Panel Discussion Topic: Components of a Good Financial Plan (Part 1) - CPF, Life and Health Insurance, & Setting up a Trust</p> <p><u>Moderator:</u> Mr Timothy Liew, Founder, Alpha Eternus Singapore</p> <p><u>Panellists include:</u></p> <ol style="list-style-type: none"> 1. Mr John Chew, Trust Director, Rawlinson & Hunter (Trust) 2. Mr Nishit Majmudar, CEO, AVIVA (Insurance) 3. Mr Soh Chin Heng, Deputy CEO, CPF
12.30pm – 2.00pm	Lunch Break
2.00pm – 2.30pm	<p>Session 7 Topic: A Holistic Approach to Retirement Planning</p> <p><u>Guest Speaker:</u> Ms Kee Siew Poh, Associate Director, Finexis Advisory</p>
2.30pm – 3.00pm	<p>Session 8 Topic: Investment Options – Making the Right Choice</p> <p><u>Guest Speaker:</u> Mr Getty Goh, CEO & Founder, CoAssets</p>
3.00pm – 3.15pm	Short Break
3.15pm – 3.45pm	<p>Session 9 Topic: Financial Planning for Unexpected Life Events like Retrenchment & Divorce</p> <p><u>Guest Speaker:</u> Mr Alfred Chia, CEO, SingCapital</p>
3.45pm – 4.30pm	<p>Session 10 Topic: Components of a Good Financial Plan (Part 2) - Investment, Retirement Planning, Financial Planning for Unexpected Life Events</p> <p><u>Moderator:</u> Mr V Maheantharan, Director, Institute for Financial Literacy</p> <p><u>Panellists include:</u></p> <ol style="list-style-type: none"> 1. Mr Timothy Liew, Founder, Alpha Eternus Singapore 2. Mr Alfred Chia, CEO, SingCapital 3. Mr Getty Goh, CEO & Founder, CoAssets
4.30pm – 4.45pm	<p>Closing Speech - Ms Edna Leong, CEO, Financial Planning Association of Singapore</p>
4.45pm – 5.00pm	Group Photo
5.00pm	End

**** Token of Appreciation will be presented after each session.**

Target Audience: NTUC Union Members (priority), General Public