FPAM COURSE OUTLINE

(A SIDC CPE-approved course)

Title:	**Evaluate Your Clients Insurance Policies**
Date:	15 June 2017 / 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:	Ms. Irene Lee Yoke Leng

Learning Outcome

Participants will be able to:

1. Identify the different types of insurance & what it meant to the planner
2. Understand different companies policy documents & how it applies to your client situation
3. What are the important information's you should have when evaluating your client's policies? Socso?
4. Recommendations-when do you preserve and when do you cancel?
5. Policies in place now, how to still keep the relationship warm.

Learning Outline

Time	Function/Paper Title
8:30 - 9:00 am	**Registration**
9:00 - 9:45 am	**Different insurance applications** • Investment Link, Traditional Life, Term, Standalone medical plan, CI, early CI
9:45 – 10:30 am	**Reading different companies plan** • This session will help to understand different companies policies details which is important to the clients planning
10:30 – 10:45 am	**Coffee break**
10:45 - 11:30 pm	**Discussion on the features of the plan** • Groups will be form for this discussion to descript the different feature and how it should be applicable. • Do you includes Socso
11:30 – 1:00 pm	**Planning for medical insurance-case study** • Standalone or Investment Link • Top up policies • Groups presentation

1:00 - 2:00 pm	**Lunch break**
2:00 - 3:30 pm	**Essential information you need from your client** • Standalone or Investment Link • Top up policies • Groups presentation **CASE STUDY -** Evaluate and take appropriate action
3:30 - 3:45 pm	**Coffee break**
3:45 - 4:30 pm	**Groups Presentation n discussion** Each group will present their recommendation and why Group discussion on the each recommendation
4:30 - 5:00 pm	**Review and recap** • Importance of review • Let's Recap

Profile of Ms. Irene Lee, FChFp, RFP, ChLP

Irene has being in the Financial Business for more than 20 years. She started in the Insurance industries and moved on to related fields in the financial arena to work more effectively for her clients. She holds a CMSR License and she write plans for her clients.

She writes regularly in The Edge weekly under Personal Wealth section. She's invited to give talks at TAR College to the undergraduates on financial planning. She also does retirement planning talk for CIMB bank staff and helps them to have an overview of their retirement situation. To her planning is a blueprint to success.

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	**Evaluate Your Clients Insurance Policies**
Speaker:	Ms. Irene Lee
Date:	15 June 2017 / 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 – 5.00 pm
Fees:	**Early Bird Special; RM 300. (FPAM Member), RM 425. (Non-members) Payment by 1st June 2017.** Normal – RM 340. (FPAM Member), RM 480. (Non-members) The 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 aniza@fpam.org.my **by 1st June 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:	
SC License / ERP No:		Mobile:	
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
Cheque payable to **Financial Planning Association of Malaysia**. Cheque no.: Amount: RM
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Early Bird Special – By 1st June 2017

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