

FPAM COURSE OUTLINE

(A SIDC CPE-approved course)



Title: Comprehensive Tax Workshop for Financial Planners and Individuals

Date: 8th July 2017 / Saturday [Full day]

Venue: Symphony Suites Hotel, Ipoh

CPE/CE/CPD: 10 CPE Points / 10 CE Points / 8 CPD Points

Instructor/s: Mr. KP Bose Dasan

Learning Outcome

Participants will be able to:

1. Identify tax law updates for 2017
2. Answer the tax questions and resolve the tax problems that arise in everyday business and personal transactions
3. Recognize the legal tax deductions and exemptions businesses and individuals may claim
4. Effectively and accurately complete business and individual tax returns
5. Communicate to clients how life changes may affect their tax situation

Learning Outline

Time	Function/Paper Title
8:30 - 9:00 am	Registration
9:00 - 9:30 am	Introduction <ul style="list-style-type: none">• Income tax concept• Features of the Malaysian Tax System• Direct vs. Indirect Tax Structures• Basis of assessment• Calculation of gross income• Deductions• Reliefs• Tax computation
9:30- 10:30 am	Malaysian Taxation System and Budget 2017 <ul style="list-style-type: none">• Tax treatment for employee• Tax treatment for business individual• Update on Budget 2017 and its impact to business and non-business individuals.
10:30 - 10:45 am	Coffee break

10:45 - 12:30 pm	<p>Real Property Gain Tax and Rental Income</p> <ul style="list-style-type: none"> • When and How RPGT is recognized • DO and DONT for RPGT calculation • When and how rental income exist and recognized • Common mistake and under estimate of rental income
12:30 - 2:00 pm	<p>Lunch break</p>
2:00 - 3:30 pm	<p>Tax Planning for individuals and Businesses</p> <ul style="list-style-type: none"> • Need and importance of tax planning • Tax avoidance and tax evasion • Tax planning for employees and businesses • Deferral of tax liability • Splitting of income • Managing losses • Maximization of deductible expenditures of individuals and business forms
3:30 - 3:45 pm	<p>Tea break</p>
3:45 - 5:00 pm	<p>Completing Returns and Impact on Submission</p> <ul style="list-style-type: none"> • Comprehensive case study on tax computation for business and non-business individual with tax planning strategies • Legal impact and penalty on mistake made during tax submission

Profile of Mr. KP Bose Dasan

[B Economics (hons.) University of Malaya], MBA (Cranfield University, U.K.)

Tax Consultant, Certified Financial Planner.

KP Bose Dasan is a tax consultant and a certified financial planner licensed as a financial planning representative (CMSRL A3260/2007 with Securities Commission) with the principal company Standard Financial Planner Sdn Bhd. He is literally the first financial planning guru in Malaysia having taught the initial batches of ChFC students at The Malaysian Insurance Institute.

He currently lectures for the CFP programme at PNB Investment Institute and Kasturi College and the Applied Financial Planning module at the Faculty of Business and Accounting, University Malaya. He has authored numerous articles on tax and financial planning that have appeared in Personal Money, Smart Investor and in The Edge. He is an executive committee member of the Malaysian Association of Chartered Financial Consultants and an elected Board Member of the Financial Planning Association of Malaysia. He firmly believes in financial planning education and wants it practiced across the length and breadth of Malaysia. He holds an economics degree from University Malaya and an MBA from Cranfield University, England

KP Bose specialty is tax planning for general wealth accumulation and retirement planning using salient tax ideas. He is also a counselor in personal financial management and behavioral finance. His thorough analysis of your personal financial circumstances and goals realization will be an education in itself. He believes in intelligent finance and notes that it is much needed in a very confusing and exploitative world.

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	Comprehensive Tax Workshop for Financial Planners and Individuals
Speaker:	Mr. KP Bose Dasan
Date:	8 th July 2017 / Saturday[full day]
Venue:	Symphony Suites Hotel, No. 41, Lapangan Symphony Business Park, Jalan Lapangan Symphony, Ipoh, Perak. Tel: +(60) 5 - 312 2288 Email: sales@symphonysuites.com.my
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.00 pm
Fees:	Early Bird Special; RM 212 (FPAM Member), RM 265 (Non-members) Payment by 20th June 2017. Normal – RM 265 (FPAM Member), RM 318 (Non-members) The fee includes 6% of GST, 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 +605 2438828 or e-mail to ipohchapter@fpam.org.my by 20th 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 ipohchapter@fpam.org.my or call Ms. Samantha at +6017 6118828 or Ms Yong at +6012 5282082
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 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
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 20th June 2017	

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