

FPAM COURSE OUTLINE

(A SIDC CPE-approved course)



Title: Practical Applications in Using REITs as Alternative Property Investment
Date: 5 August 2017 / Saturday [Full day]
Venue: Grandis Hotel, Kota Kinabalu, Sabah
CPE/CE/CPD: 10 CPE Points / 10 CE Points / 8 CPD Points
Instructor/s: Mr. Lieu Ching Foo

Learning Outcome

Participants will be able to:

1. Identify the terminologies and fundamentals in REIT investing.
2. Distinguish the different classes of REITs by its structures and underlying assets.
3. Analyze the advantages and limitations in REIT investment compared to direct property investment.
4. Explain the analysis & valuation method for profitable and sustainable REIT investing.
5. Construct a defensive REIT investment portfolio for cash flow generating retirement planning, regardless of market cycle.

Learning Outline

Time	Function/Paper Title
7:30 - 8:00 am	Registration
8:00 - 8:30 am	The fundamentals of REIT <ul style="list-style-type: none"> • An introduction to REIT, and how to invest in the available REIT counters in Malaysia
8:30 - 9:30 am	Basic terminologies in REIT investing <ul style="list-style-type: none"> • Dissects the terms and jargons used in REIT annual reports. It is important to build a solid foundation of understanding for subsequent topics.
9:30 - 9:45 am	Coffee break
9:45 - 11:00 am	Types of REITs and how they are differentiated <ul style="list-style-type: none"> • Explores different types of REITs in Malaysia, their strengths and weaknesses from investors' perspective

11:00 - 12:00 pm	<p>How does REIT fare against direct property investments?</p> <ul style="list-style-type: none"> • An explanation of the pros and cons of REIT investment compared to direct property investment. • How to tweak the strategies employed in direct property investment and deploy it for REIT investing
12:00 - 1:00 pm	Lunch break
1:00 - 2:45 pm	<p>Fundamental Analysis of REIT investment</p> <ul style="list-style-type: none"> • The various quantitative and qualitative indicators of a fundamentally sound REIT are discussed as highlighted below, with case studies included – <ul style="list-style-type: none"> i) DPU and Distribution Yield ii) Net Property Income iii) Expenses Ratio iv) Properties valuation v) Property Yield vi) Asset acquisition, asset disposal and asset enhancement initiatives
2:45 - 3:00 pm	Tea break
3:00 - 4:00 pm	<p>Construct a REIT portfolio for retirement cash flow</p> <ul style="list-style-type: none"> • Create a diversified REIT portfolio which generates consistent net yield of minimum 6 percent per year, regardless of economy cycle • Evaluate the required capital needed to accomplish this using capital liquidation or capital preservation method • Use fundamental analysis to spot the right entry price to achieve this

Profile of Mr. Lieu Ching Foo

Lieu Ching Foo, is currently a Financial Planning Manager at Cheng & Co Wealth Management, a division of Cheng & Co Chartered Accountants and a practice office of Standard FA. He obtained CFP in 2013, with FPAM Merit Award in Module 6: Financial Plan Construction & Professional Responsibilities.

His specialization is fees-based financial planning, because CF Lieu, believes that every household should have a comprehensive, custom-tailored financial plan, where each aspects of your financial matters below must be coordinated and integrated so that we can see with clarity, the cause & effect of one aspect affecting the others.

He has conducted virtual educational trainings on REIT investment with students all over Malaysia via his online membership site at REITMethod.com since 2013. He has written numerous articles in REIT investment and financial planning, which have been published in Money Compass magazine and StarProperty.my.

CE COURSE REGISTRATION FORM / INVOICE

Title of Course:	Practical Applications in Using REITs as Alternative Property Investment
Speaker:	Mr. Lieu Ching Foo
Date:	5 August 2017 / Saturday [full day]
Venue:	Grandis Hotel, Kota Kinabalu Sabah
Registration:	7.30 am – 8.00 am
Time:	8.00 am – 4.00 pm
Fees:	Early Bird Special; RM 300. (FPAM Member), RM 350. (Non-members) Payment by 21st July 2017. Normal – RM 400. (FPAM Member), RM 450. (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 +603 7954 9400 or e-mail to aniza@fpam.org.my by 21st July 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 events@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 Licence / ERP No:		Mobile:	
Contact Person:		Telephone:	

Mode of Payment

By cash, please bank into Alliance Bank A/C 1210 9001 005 6049 and email or fax in bank-in slip	
Cheque payable to Financial Planning Association of Malaysia (Sabah)	
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 21st July 2017	

EMAIL: events@fpam.org.my / FAX: +603 7954 9400