



Transforming Financial Planning Practice for Total Client Experience Workshop

Facilitator



John Page,
R.F.P., CFP®, RFC

By John Page

on 28 August 2017, 9am – 5pm

at Rafflesia 1, Sime Darby Convention Centre, KL

10 CE Points / 8 CPD Points

Transforming Financial Planning Practice for Total Client Experience

Is this important to you?

- ✓ Setting the stage to begin the 1st meeting by establishing more trust than you thought possible
- ✓ Determining what the client values and is important in their life
- ✓ Knowing what to include in a financial plan and how to present it
- ✓ Establishing quality assurance in your client servicing according to best practices

If the answer is YES, this workshop is just for YOU!

Come learn from John Page in person on how you can transform your financial planning practice to provide value for a total client experience. This is a one-time event as John is visiting KL to speak in the Annual Financial Planning Signature Conference (AFPSC) 2017.

Discover the 8 steps Wealth Enhancement Process®, what you should do to secure an engagement, what a financial plan should have and how to present it effectively, how to obtain quality assurance through client satisfaction questionnaires and referrals as well as how to package your services to show the depth and breadth of your services.

Program outline

8.30am	Registration
9.00am	The Wealth Enhancement Process® – Part I
10.15am	Break
10.30am	The Wealth Enhancement Process® – Part II
11.45pm	Securing Client Engagement
1.00pm	Lunch
2.00pm	What a Financial Plan Should Include
3.30pm	Break
4.00pm	Packaging your Financial Planning Services
5.00pm	Q&A
5.30pm	End

Remarks: This program has been submitted for SIDC approval.

Date:

28th August 2017 (Monday)

Time:

Register : 8.30am

9.00am – 5.00pm

Venue

Rafflesia 1

Sime Darby Convention
Centre

1A, Jalan Bukit Kiara 1

Bukit Kiara

60000 Kuala Lumpur.

Fee:

FPAM Member : RM 212.00

Non-Members: RM 265.00

*Fee includes seminar
materials, buffet lunch and
refreshments*

For more information,
please contact Mr Bey Bun
Kiat at 03 7954 9500 or
email to:
marketing@fpam.org.my

Hurry, limited seats are
available!

Transforming Financial Planning Practice for Total Client Experience

Registration Form

Participant Name		IC Number	
Membership No.		Contact No.	
Email address			

Details

Date : 28th August 2017 (Monday)

Time : 9.00am to 5.00pm

Venue : Rafflesia 1, Sime Darby Convention Centre, 1A, Jalan Bukit Kiara 1, Bukit Kiara, 60000 Kuala Lumpur, Wilayah Persekutuan Kuala Lumpur.

i **Fee (inclusive of 6% GST)**
FPAM Member : RM 212.00

Non-member : RM 265.00

Mode of Payment:

1. Please register and pay online at <https://www.fpamonline.org.my/smvc/>; or
2. Bank in or transfer online to "Financial Planning Association of Malaysia" Alliance Bank Malaysia Berhad, Account Number: 1210 9001 0005 395. Thereafter, please email the registration form and transaction slip as proof of payment to marketing@fpam.org.my

Terms & Conditions:

Please register latest by 23rd August 2017 (Wednesday).

Registration is on a first-come-first-served basis. Confirmation is subject to payment before the event. Walk-in participant/s will be admitted on the basis of space availability.

Signature

Date

Name: