Membership Affinity Programme (MAP)

FPAM did a simple member's survey in 2014 and took note of the feedback given. One of the key areas was having the right tools, systems and services for their respective areas of speciality.

On this note, FPAM curated such a list under our Membership Affinity Programme for your easy use. The purpose of this list is to build upon what you already have to enhance your service to your clients and customers, and it is recommended to the following:

- tied agents;
- financial advisers; and
- licensed financial planners.

FPAM members will be able to enjoy special member's rate, and gain CE points for your subscription(s). As soon as you have paid for your magazine and/or professional tools subscription(s), email FPAM at events@fpam.org.my , cc: marketing@fpam.org.my with the tax invoice, receipt or any proof of payment. Information which should show on your proof of payment are:

1) Your name (as per Identity Card)
2) Payment date
3) Amount paid
4) Duration of subscription (1 or 2 years)

Watch this organic list from time to time, for the latest addition!

A.	**Magazine Subscriptions**		**Keep yourself updated at your leisure**		
Publication		**Category**	**Annual Members Rate (RM)**	**Annual Public Rate (RM)**	**CE Points**
1.	**Smart Investor** by Inovatif Media Asia	Business/financial investment/economics	64.80	102.00	5

For more information, please visit the website at http://www.smartinvestor.com.my.

B.	**Professional tools**	**Enhance & add on to your current tools**			
	Software	**Members Rate (RM)**	**Public Rate (RM**	**CE Points***	**Type of Members**
1.	PlanPlus			6	• Licensed Financial Planners • Financial Advisor Representatives • Financial Institutions
	• Bundle 1: Financial Advisor Plus + Finametrica 12	192.00 per month	240.00 per month		
	• Bundle 2: Professional Financial Planner + Finametrica 12	264.00 per month	330.00 per month		
2.	XPERT ePLAN			6	• Financial planning firms • Licensed Financial Planners • Financial Advisor Representatives
	Subscription by Financial Planning Firm (FP firms):				
	• FP firm set-up cost (once off payment)	4,500.00	6,000.00		
	• FP firm portal licence	2,500.00 per month	3,000.00 per month		
	Subscription for planners/advisers of above FP firms:				
	• Planner Licence (full functionality, includes Recommendation & financial plan development)	30.00 per month per planner	45.00 per month per planner		
3.	**Finametrica**			6	• Unit Trust Consultants • Corporate Unit Trust Agents
	Psychometric Risk Profiling	AUD535	AUD595		

** Points will be prorated for subscriptions which are less than 1 year.*

Creating a financial plan that is suitable for your client is essential. Hence, it is important to use a comprehensive financial planning software such as PlanPlus.

Corporate subscribers of PlanPlus can be assured that the financial planning tools could be integrated seamlessly into their existing systems. Customisation of the software to meet the company's requirements can be done and is relatively easy. Training and support for the software are available.

Unit trust consultants and PRS Consultants may use FinaMetrica's psychometric risk profile system to determine the client's risk tolerance. This system comes in a set of 12 or 25 questions, depending on the plan that you opt for.

PlanPlus and FinaMetrica are 2 systems that can be integrated and used together to develop a modular/comprehensive financial plan for clients within a short time frame. These software can be easily accessed anytime via web application.

XPERT ePlan

Equipping financial planners with the right tools is critical. At X'PERT TECHNOLOGIES, we have developed a WEB BASED Financial Plan System that allow them to work with their clients on a Real time, on-line access at any point in time.

With XPERT ePlan, your planners can maintain the customer financial plan and easily update any latest changes on its' financial standing accordingly but most important it gives them the right information to help them to provide the right advice to the customers.

Features:

- Customer Fact Finding and Goals Management
- Dynamic Customer Net worth & Cash flow Development
- Dynamic Customer Retirement Plan
- Asset Allocation/ Risk Profiler test
- Education Need Analysis
- Insurance Need Analysis
- Financial Health Check and Ratio Analysis
- Integration with XPERT CRM and Commission System and more

For more information, please contact Xpert Technologies at 03 – 2116 5996 or email helpdesk@xpert-asia.com.

FinaMetrica

The FinaMetrica Risk Tolerance Toolkit was launched in 1998. It was developed and trialed in Australia over four years with the assistance of the University of New South Wales. It's now maintained with expertise from the London School of Economics, and has gained international recognition as world's best practice. The Toolkit's reliability and validity is backed by over a million uses by thousands of financial advisors in over 20 countries.

Try the FinaMetrica Risk Tolerance Toolkit™ (http://riskprofiling.com/trial) now to help you create lifetime partnerships by specifically matching client's risk tolerance to tailored investment advice. Give better advice and create clients that invest more, refer more, and stay clients for life.

For more information, visit www.riskprofiling.com

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Updated as December 2017