RAISING THE BAR OF FINANCIAL PROFESSIONALS

Annual Signature Financial Planning Symposium 2018

Consumer Behavior · FP Remuneration · Strategic Client-Centric Product Advise · Risk Compliance · FP Technology

10	8	6
FPAM CE Points	FIMM CPD Points	MFPC CPD Points

FPAM CE points recognized for FAR continuing education requirements

Organised by FPAM Financial Planning Association of Malaysia

Supporting Organization AFA Association of Financial Advisers · IBFIM · MFPAA Malaysian Financial Planners and Advisers Association · MFPC Malaysian Financial Planning Council Competence.Ethics.Standards

Media Partner smartinvestor · Money compass 精明理財

The Financial Planning Association of Malaysia (FPAM) is organizing the Annual Signature Financial Planning Symposium 2018. It aims to provide Malaysians with a unique platform to discuss, explore and share global experiences and trends within the financial planning profession. Both foreign and local practitioners in the field of financial planning will be sharing their experiences and good practices.

23rd JULY 2018 (Monday) 9.00am-5.30pm

Securities Commission, Bukit Kiara, Kuala Lumpur

Fees Structure & Registration

Category	Fees	
	Early Bird by 30 June 2018 (RM)	After 30 June 2018 (RM)
FPAM MEMBERS (Group of 3)	320	
FPAM Members	370	420
Supporting Associations	420	470
Non-members (Group of 3)	420	
Non-members	470	520

Terms & Conditions

- The fee includes 6% of GST, lunch and refreshments.
- To be entitled for group rate, please complete the attached registration form and email to events@fpam.org.my
- Fees are not refundable, replacement of delegate(s) is acceptable before 10 July 2018.
- Registration is confirmed only upon receipt of proof of payment.
- To register online, click here to register or log on to https://www.fpamonline.org.my/smvc/

Target Participants

- Licensed Financial Planners
- Financial Adviser Representatives
- Academicians/ Educators
- Related Financial Professionals

This symposium is brought to you by FPAM · CFP · Islamic Financial Planner

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Indicative Programme

Time	Agenda
08:00 am	Registration & Welcome Coffee
09.00 am	Welcome Address by Ismitz Matthew De Alwis, CFP President of Financial Planning Association of Malaysia
09.15 am	Keynote Address by YBhg. Tan Sri Dato' Seri Ranjit Ajit Singh Chairman of Securities Commission Malaysia
09.30 am	Launching of CMDF-Sponsored smartfinance.my
09.35 am	Award Ceremony of Malaysian Financial Planner of the Year Award 2018
10:00 am	Tea Break
10.30 am	Session 1: Behavioral Economics of Consumers Dr Joanne Yoong Su-Yin, Senior Economist, Center for Economic and Social Research, University of Southern California
11:20 am	Session 2: Remuneration Model in Financial Planning Moderator : Rajen Devadason, CFP CEO RD WealthCreation Sdn Bhd Licensed Financial Planner with Manulife Asset Management Services Berhad Panelists: • Rafiq Hidayat Mohd Ramli, CFP WealthVantage Advisers Sdn Bhd • VP. Thanga, CFP Licensed Financial Adviser Executive Director, Blueprint Planning • Catherine Khoo, CFP, IFP Licensed Financial Planner with CIMB-Principal Asset Management Bhd
12.30 pm	Lunch & Networking
2.00 pm	**[Breakout Session]** Session 3 : Strategic Client-Centric Packaging of Financial Products & Services Session 3a : Conventional Financial Planning Moderator: Noel Maye, Chief Executive Officer, Financial Planning Standards Board (FPSB), USA Panelists: • Samuel Hwa Head Of Business Development, RHB Trustees • Tan Teng Boo Managing Director, Capital Dynamics • Mark O'Dell Chief Executive Officer, Manulife Malaysia Session 3b: Islamic Financial Planning Moderator: Sani Hamid Director (Economy & Market Strategy) Financial Advisory, Head, FAA Islamic Wealth Advisory Panelists: • Abdul Aziz Peru Mohamed President / Chief Executive Officer, as- Salihin Trustee Bhd • Hajjah Zarinah Mohd Yusoff, CFP, IFP • Muhammad Fikri Mohamad Rawi Chairman, Malaysia Takaful Association
3.00 pm	Session 4: How governance, risk compliance and best practices can grow your financial planning profession Robin Lee, Managing Director of Xperientia, Chief eXperience Officer at Inzsure, Singapore
3.45 pm	Tea Break
4.15 pm	Session 5: How to handle new technological developments in the financial industry Moderator : Shawn Brayman, Chief Executive Officer, PlanPlus Global Inc., Canada Panelists: • Dr Mahmood Al-Imam, P.Eng, Data Scientist, BTM Blockchain Technology • YB Datuk Paul Khoo, CFP President, Fintech Association Of Malaysia (FAOM) • Robin Lee, Managing Director of Xperientia Chief eXperience Officer at Inzsure, Singapore

Disclaimer :

FPAM reserves the right to change the speaker (s), date and to cancel the symposium without prior notice.

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Speakers Profile

Welcome Address by

Ismitz Matthew De Alwis,CFP

President of Financial Planning Association of Malaysia

Keynotes Address by

Securities Commission

Dr Joanne Yoong Su-Yin

Senior Economist, Center for Economic and Social Research, University of Southern California

Joanne is an applied micro-economist conducting research on behavioral economics, health and financial decision making. She is a Senior Economist at the University of Southern California, where she directs the research program for the Center for Economic and Social Research (East) and participates in the University of Southern California's Behavioral Economics Studio, a newly-founded initiative to promote the translation of behavioral insights into better policy by providing advisory, consultancy and training support to public sector and nonprofit organizations. Her academic research has been published in leading journals and has been funded by the WHO, OECD, NIH, DFID, World Bank and USAID

Rajen Devadason,CFP

CEO, RD WealthCreation Sdn Bhd
Licensed Financial Planner with
Manulife Asset Management Services Berhad

Rajen is a senior Malaysian financial planner who specialises in crafting and managing retirement funding solutions. He has authored or co-authored 10 books, including Malaysia's first comprehensive financial planning book in 1998. Rajen's a member of MENSA UK, the Financial Planning Association of Malaysia (FPAM), the Malaysian Association of Professional Speakers (MAPS) and the Global Speakers Federation (GSF). He writes the regular financial planning columns for the New Sunday Times and Asian Beacon magazine.

Rafiq Hidayat Bin Mohd Ramli,CFP

Managing Director
Wealth Vantage Advisers Sdn Bhd

Rafiq Hidayat began his career as a management consultant with PricewaterhouseCoopers (PwC) and Ernst & Young (EY), where he advised clients in the areas of human resource management and strategic planning. He then became part of the pioneering team that helped setup Talent Corporation Malaysia Bhd (TalentCorp). He then furthered his career working as a global consultant in human resource management in the Middle East. He decided to make a career change to Financial Services in early 2014 due to his passion in helping individuals to improve their personal financial situations.

VP. Thanga,CFP

Executive Director
Blueprint Planning and License Financial Adviser

VP. Thanga is the executive director of Blueprint Planning. He is a Licensed Financial Planner, Financial Advisor and holds a Corporate Unit Trust Advisor (CUTA) license from the Federation of Investment Managers Malaysia (FIMM). Thanga was recognized as the second highest top scorer in Malaysian Financial Planner Year Award (MFPYA) at national level competition in 2015 and again in 2017. Thanga appears regularly on radio and TV shows and served as a main committee member handling R&D in Malaysia Indian Business Association.

Catherine Khoo,CFP,IFP

Licensed Financial Planner with
CIMB-Principal Asset Management Bhd

Catherine joined CIMB Wealth Advisors Berhad (CWA) in 2001 as unit trust consultant and later joined the Financial Planning Centre as a licensed Capital Market Services Representative of CIMB-Principal Asset Management Bhd in 2005. Catherine is a holder of Islamic Financial Planner as well as a Financial Advisor Representative. Catherine has over 17 years of working experience in the financial services industry and she was the first winner of the Malaysian Financial Planner of the Year Award in 2015.

Noel Maye

Chief Executive Officer,
Financial Planning Standard Board

Noel Maye is the Chief Executive Officer of FPSB. Before joining the organization, Maye was senior vice president of Certified Financial Planner Board of Standards, Inc., (CFP Board) in the United States, where he oversaw the international, legal, consumer and public affairs, and communications departments, and served as corporate spokesperson. Prior to CFP Board, he was an associate with Ogilvy, Adams & Rinehart, a New York-based public relations firm, where he specialized in working with financial services clients. Maye received the Certified Association Executive credential in 2003 and is qualified as a lead auditor for certification bodies through the American National Standards Institute.

Samuel Hwa

Head of Business Development,
RHB Trustees Berhad

He graduated from a law school in London and business school in America double majoring in Finance and Marketing/Management. He started his career in America with Merrill Lynch. In 2014 he returned to Malaysia and joined ING Insurance. Prior to joining RHB Trustees Berhad, he was with CIMB Investment Bank as a Business Development Manager and later as a Product Manager in Securities Services. He then joined Maybank as the Head of Business Development in Securities Services and was subsequently promoted as Head of Securities Services Malaysia.

Mark O'Dell

Chief Executive Officer,
Manulife Malaysia

Mr. Mark Steven O'Dell, was appointed to the Board on 18 January 2013. He has over 35 years of experience in the life insurance business including 20 years in Asia across multiple geographies namely Singapore, Indonesia and Malaysia. Prior to his appointment as Group Chief Executive Officer, Mr. O'Dell served as the President and Chief Executive Officer of Manulife Taiwan since 2008. He was also instrumental in the establishment of Manulife Asset Management Taiwan

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Tan Teng Boo

Managing Director
Capital Dynamics

Tan Teng Boo, the founder & CEO of Capital Dynamics, has over 40 years of investment experience with an outstanding record of consistent performance. Teng Boo possesses an innate understanding of the global economy and is very well versed with the major economies. He has acquired an uncanny insight into global equity markets and listed companies through his fascination with the stock market, his working experiences and academic background which has enabled him to be very familiar with different methods of investment analysis and approaches. As a highly regarded investment expert, his views are frequently sought after by international media.

Sani Hamid

Director (Economy & Market Stretegy),
Financial Advisory Head, FAA Islamic Wealth Advisory

Sani has more than 21 years of working experience in the financial markets, having worked for companies such as S&P MMS where he led a team of analysts covering Emerging Asian economies; BNP Paribas Peregrine as a senior economist; and S&P Ratings as a Director in the sovereign team overseeing the ratings of countries such as Indonesia, India, Malaysia and Singapore. Sani presently sits on the Investment Committee of the Majlis Ugama Islam Singapura (MUIS) and advises several Muslim Welfare Organizations on investment matters.

Abdul Aziz Bin Peru Mohamed

President, CEO
as-Salihin Trustee Berhad

Vast experience in holding various Senior Management positions in the banking industry with almost 30 years accomplished career track record spanning management of branch network and retail banking. During the years in the industry, he was appointed Chairman of the Rules Committee of the Association of Banks of Malaysia and had held several other key positions. Joined as-Salihin Trustee Berhad as an Advisor in July 2005, eventually been asked to be Chief Executive Officer in January 2006 .The latest, he was appointed as the Chairman of RHB Insurance Berhad in 2017.

Datuk Paul Khoo,CFP

President, Fintech Association of Malaysia

Datuk Paul Khoo has over 19 years of financial services industry experience and obtained his fund manager representative license while he was in the fund management industry. He joined StandardFA, where he was CEO, overseeing Malaysia & Vietnam. He started his fund management career with a global asset management firm and assumed various senior roles before serving as their Chief Marketing Officer. He is currently the non-executive Chairman of StandardFA and sitting as Vice President of FinTech Association of Malaysia, Board of Governor and Honorary Secretary of Financial Planning Association of Malaysia.

Muhammad Fikri Bin Mohamad Rawi

Chairman, Malaysian Takaful Association

Mr Fikri began his career in the banking sector back in 1993 at Bank of Commerce (M) Berhad (now known as CIMB Bank Berhad and one of Malaysia's leading financial groups). He then joined Commerce Asset-Holding Berhad (now known as CIMB Group Holdings Berhad) as Manager of Finance and Administration in 1995 and subsequently moved up the ranks to his last position of SVP, Planning & Risk Management. His areas of exposure include Banking, Capital Management, Risk Management, Finance and Insurance.

Robin Andrew Lee Sean Loong

Managing Director, Xperientia
Chief eXperience Officer Inzsure, Singapore

Robin began his career in Silicon Valley in various startups within the Compliance space. After 6 years, Robin proceeded to Wall Street where he worked in the hedge fund industry for 4 years covering technology companies as a Trader, Research Analyst and Portfolio Manager. Robin presently sits on the advisory boards of Shift Jobs (HR Technology company), Governance Risk and Compliance Investments and Technology (RegTech Investments) and Dynamic GRC (RegTech).

Shawn Brayman

CEO, PlanPlus Global Inc.

Shawn Brayman is the CEO of PlanPlus Global, an amalgamation of two world leaders in Fintech solutions for financial planners and advisors – FinaMetrica and PlanPlus. In 1986 Shawn became involved in the knowledge engineering and development of an early financial planning expert system for a Canadian insurance company. In 1990 Shawn started PlanPlus Inc. and has been working in the financial planning field ever since, delivering software, training and business consulting services.

Hajjah Zarinah Binti Mohd Yusoff,CFP,IFP

Freelance trainer, module writer and author

Hajjah Zarinah Mohd Yusoff specializes in Islamic Financial Planning and Wealth Management. She had co-wrote two books; Islamic Financial Planning and Wealth Management (2013) and Islamic Investment Planning (2014), published by IBFIM. Hajjah Zarinah holds an MBA, specializing in Islamic Banking and Finance from IIUM and a Bachelor of Accounting from UUM.

Dr Mahmood Al-Imam,P.Eng, PhD

BTM Blockchain Technology

Mahmood is BTM's Data Scientist and a well-known speaker, assisting in integrating AI, Machine Learning and BackEnd Development with Blockchain. He's passionate about educating people in AI and Machine Learning. Above all, he's a certified professional in corporate training.

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***To be eligible for Group Rate, each delegate must complete the Registration Form submit as a group.**

Name (Dr / Mr / Mrs / Ms / Mdm): As per NRIC / Passport

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NRIC / Passport No: ________________________________ **CMSRL Licence No:** ____________________

Association : (FPAM / AFA / MFPAA / MFPC) **Membership No:** ________________________________
(Please circle for the relevant only)

Email address: ____
(valid email address is needed for confirmation of registration)

Mobile No.: ________________________________ **Telephone No.:** ___________________________

Company Name: ____

Mailing Address: ____

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PRICE (Please √ whichever applicable)

√	ITEM	Price per pax (RM) (inclusive of 6% GST)
	FPAM Member (Early Bird by 30th June 2018)	370
	FPAM Member (Normal Rate)	420
	Supporting Associations Members (Early Bird by 30th June 2018)	420
	Supporting Associations Members (Normal Rate)	470
	Public (Early Bird by 30th June 2018)	470
	Public (Normal Rate)	520
	Group FPAM Member Rate **(Minimum 3 pax)** *	320/pax
	Group Public Rate **(Minimum 3 pax)** *	420/pax

Breakout Session (Session 3)

(Choose only ONE session; Please √ whichever is applicable*)*

I would like to attend the following breakout session 3 :

( ) Session 3a : Conventional Financial Planning
( ) Session 3b: Islamic Financial Planning
(*Only 100 seats available, first come first served)*

MODE OF PAYMENT (Please ✓ whichever applicable)

☐ **CASH / ONLINE / ATM TRANSFER**
Please bank into **FPAM's Alliance Bank A/C 1210 9001 0005 395** and email or fax a copy of payment receipt / bank-in slip to us

☐ **CHEQUE**
Please issue the 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.
Cheque No.: ________________________________ **Amount: RM** ____________________

☐ **CREDIT CARD**
Charge my credit card: ☐ Visa ☐ Mastercard ☐ Diners ☐ Amex
Cardholder's Name: ____
Credit card No.: __________ - __________ - __________ - __________ **Expiry date:** ________ / _______
{4 digits bank code on front of card ___ ___ ___ ___(Amex only)}
Amount: RM _______________ (*We will process and charge your credit card upon receipt of this form)*
Cardholder's Signature: ___________________________ **Date:** ____________________

Early Bird deadline by 30th June 2018

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

Cancellation Refund Policy : Fees are not refundable.

Replacement of delegate(s) is acceptable before 10th July 2018.

This symposium is brought to you by FPAM CFP ISLAMIC Financial Planner