

FPAM COURSE OUTLINE



Title: Aging Well Financially & Growing Old with Dignity
Date: 30 June 2018 / Saturday [Full day]
Venue: M Roof Hotel, Perak
CPE/CE/CPD: 10 CPE Points / 10 CE Points / 8 CPD Points
Facilitators: Ms. Evonne Chen

Learning Outcome

Participants will be able to:

1. Identify areas of concern for individual client with regards to their retirement and old age needs.
2. Identify the various determinants to stay active during old age (the determinants of active aging).
3. Identify and analyse the various aspects of old age living.
4. Identify and quantify the funding requirements to formulate a total solution for active aging.
5. Develop a systematic approach for total solution of old age planning.

Learning Outline

Time	Details
8:30 - 9:00 am	Registration
9:00 -10:30 am	Overview of Old Age Planning
10:30 – 10:45 am	Coffee Break
10:45 – 11:15 am	Activity <ul style="list-style-type: none">• This session allows the participants to brainstorm the issues, challenges and/or areas of concern with regards to old age, especially on how it affects one’s dignity as he or she ages
11:15 -1:00 pm	The Total Solution for Senior Living - Health and Aged care <ul style="list-style-type: none">• This session explores the areas to address during old age, explanation of the potential risks involve, what are the planning options, and what are the solutions.• Aspects of old age planning – e.g. things to take note of, the flexibility of instructions given in the areas of old age planning, who will execute or implement such plan, retention of control, who to nominate to act on behalf when he or she is incapacitated etc.
1:00 - 2:00pm	Lunch Break

Time	Details
2:00 - 3:30 pm	<p>The Total Solution for Senior Living – lifestyle, social & recreation, psychology and lifelong learning</p> <ul style="list-style-type: none"> • This session explores the areas to address other than the physical and mental health during old age. • Definition of “Third Age” Explore potential lifestyle, what are the options, and what are the solutions while in Third Age.
3:30 - 3:45 pm	Coffee Break
3:45 - 4:30 pm	<p>Case Studies</p> <ul style="list-style-type: none"> • A case study will be given to the participants to do a comprehensive old age planning. Example of questions to answer: <ul style="list-style-type: none"> i) What do you plan to do as you grow old? ii) What have you done so far to ensure an enjoyable retirement life? iii) How much money do you need to sustain your retirement life, including making provision for potential medical condition?
4:30 - 5:00 pm	<p>Discussion on Case Study and Conclusion</p> <ul style="list-style-type: none"> • This session will allow participant to present their case and discuss the importance, advantages and limitations of a comprehensive planning for old age and how to help clients to grow old with dignity.
5:00 - 5:30 pm	Q & A

Profile of Ms. Evonne Chen

Evonne Chen is a Licensed Financial Planner with FA Advisory Sdn. Bhd. (FA Advisory) holding the Capital Market Services Representative License by Securities Commission, the Financial Advisor Representative License by Bank Negara Malaysia, the Corporate Unit Trust Advisor Representative License and the Corporate Private Retirement Scheme Advisor License by Federation of Investment Managers Malaysia (FIMM). Evonne was appointed as Director for advisory and practice management since 2010 for Standard FA Practice Office in Ipoh and by having the licenses from the regulators, Evonne has met the compliance requirement to provide comprehensive financial planning services to clients. She is among the first few Certified Financial Planner CFP^{CERT}™ designee who became licensed Independent Financial Planner in Ipoh.

She was with Ernst & Young handling audit and due diligence services for merger and acquisition. Prior to joining the IFA profession, she has 6 years’ experience in the unit trust industry. Since June 2015 she was appointed as the Practice Manager of FA Advisory managing the practice office in Ipoh. Currently Evonne is the Chairman for Financial Planning Association of Malaysia Perak Chapter; she has contributed financial articles to Sin Chew Daily, Money Compass, Smart Investor, 4E Journal and to Her World - a non-financial lifestyle magazine.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	Aging Well Financially & Growing Old with Dignity
Facilitators:	Ms. Evonne Chen
Date:	30 th June 2018 / Saturday[full day]
Venue:	M Roof Hotel, Perak
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.30 pm
Fees:	Early Bird Special; RM 205 (FPAM Member), RM 255 (Non-members) Payment by 22nd June 2018. Normal – RM 255 (FPAM Member), RM 305 (Non-members) The fee includes workshop materials, lunch and refreshments.
CE Points (FPAM): CPE Points (SIDC): CPD Points (FIMM):	Ten (10) Ten (10) Eight (8)
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to events@fpam.org.my by 22nd June 2018 for early bird rate.
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 Yong Hiew Leng at 012-5282 082 / Kathryn Lam at 012-5079093
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.	
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Charge my credit card: <input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/> Amex <input type="checkbox"/> Diners	
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