FPAM COURSE OUTLINE

Title:	**My Estate: Administration of an Estate/Trust and Planning For The Next Gen$**
Date:	8 December 2018 / Saturday [Full day]
Venue:	Rafflesia 1, Sime Darby Convention Centre, Kuala Lumpur
CPE/CE/CPD:	10 CPE Points / 10 CE Points / 8 CPD Points
Facilitator:	Nur Sabrina Soon Binti Abdullah

Learning Outcome

Participants will be able to:

1. Define and understand administration on various Estate Planning instruments to achieve the desired objectives.
2. Identify the legal implications on various Estate Planning instruments.
3. Identify the different tools to advise clients on Estate Planning and Business Succession Planning.
4. Determine the appropriate method of planning for the next generation.

Learning Outline

Time	Details
8:30 - 9:00 am	**Registration**
9:00 - 10:30 am	**Various instruments on Estate Planning** • Introduction to various instruments for Estate Planning • Wills/ Wasiyyah • Living Trust • Declaration of Trust/ Declaration of Hibah • Business Protection Trust • Power of Attorney
10:30 - 10:45 am	**Coffee Break**
10:45 – 12:00pm	**Will/ Wasiyyah** • How to write a Will/ Wasiyyah • What are the essential requirements in the document
12:00 – 1:00 pm	**Will/ Wasiyyah (Continuation)** • What are the legal implications • Administration of a Will after lifetime • How do you plan for the next generation
1:00 - 2:00 pm	**Lunch Break**

Time	Details
2.00 – 3.00 pm	**Living Trust** • What are the essential requirements in the Trust Deed • What are the legal implications • Administration of a Trust by the Trustees • Powers of Trustees/ Settlors/ Protectors and Beneficiaries • How do you plan for the next generation
3.30 – 3.45 pm	**Coffee Break**
3:45 – 4:15 pm	**Declaration of Trust/ Declaration of Hibah** • What are the essential requirements in the Trust Deed • What are the legal implications • How does it work and when will this take effect • Powers of Trustees/ Substitute Trustees/ Protectors and Beneficiaries • How do you plan for the next generation
4:15 – 5:00 pm	**Business Protection Trust** • What are the agreements required • What are the legal implications • How does it work and when will this take effect • Powers of Trustees/Protectors and Beneficiaries • How do you plan for the next generation
5:00 – 5:30 pm	**Q & A**

Profile of Nur Sabrina Soon Binti Abdullah

Sabrina is a consultant of her own advisory company. She gives professional advices to high networth individuals to assist them to set up their Estate Planning, Trust Planning as well as Business Succession Planning for Muslims and non Muslim individuals. A few of her many clients that she has structured their Estate Planning and Private Trust are ’Tan Sri Dato’ Sri Paduka Lim Kok Wing“ (the founder of ’Limkokwing University’) and Tan Sri Datuk (Dr) Hj Mustapha Kamal (the founder of ’Emkay Group of Companies’).

She has 23 years of working experience in both local and international trustee companies. She was a Director with CIMB Trustees Services and Associate Director with RHB/ OSK Trustees Services. She was also the Senior Manager with HSBC (Malaysia) Trustee Berhad for 18 years. She was dealing with both private and corporate clients. She was in charge of Retirement Schemes, Bonds, Escrow and Stakeholders for Corporate Clients. She dealt with Estate Administration and Private Trust for individual clients. Her clients ranges from Corporate clients such as Nirvana Memorial Park Malaysia and Nilai Memorial Park to high networth Individual Clients. She also dealt with Estate Administration, being the executor or administrator of deceased estates.

Prior to her attachement to HSBC (Malaysia) Trustee Berhad, she was with HSBC Bank Malaysia Berhad for 10 years and was attached to Treasury, Credit and Operations. She also conducts training for insurance life planners, financial planners and gives presentations to the public. Sabrina holds a Degree in Banking and a Diploma in Accounting.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	**My Estate: Administration Of An Estate/Trust And Planning For The Next Gen$**
Facilitators:	Nur Sabrina Soon Binti Abdullah
Date:	8 December 2018 / Saturday[full day]
Venue:	Rafflesia 1, Sime Darby Convention Centre, Kuala Lumpur
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.30 pm
Fees:	**RM 285 for members and public.** 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 7th December 2018
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 Valerie 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:			
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Mode of Payment

By cash, please bank into **Alliance Bank A/C 1210 9001 0005 395** and email or fax in bank-in slip

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Closing Date 7th December 2018

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