

FPAM CE WORKSHOP OUTLINE



Title: YES! The Feng Shui of Money – Managing Cash Flow to Build Wealth
Date: 23 February 2019, Saturday (Full day)
Venue: Renaissance Hotel, Permas Jaya, Johor Bahru
Points: 10 CPE Points / 10 CE Points / 8 CPD Points
Facilitator: KP Bose Dasan

Learning Outcome

Participants will be able to:

1. Identify the key to building personal wealth
2. Distinguish between good and bad cash flow
3. Identify factors leading to bad cash flow
 - a. Apply techniques to reduce and manage debt
 - b. Apply techniques to minimize expenses
4. Identify factors that lead to good cash flow
 - a. Identify and develop habits and attitudes
 - b. Develop a personal career plan to enhance income
 - c. Identify risks that disrupt income capacity and techniques to mitigate risk
5. Identify factors that enhance good cash flow
 - a. Develop an approach to improve savings
 - b. Develop an approach to improve investments
 - c. Apply techniques to select appropriate financial products
6. Apply techniques learnt to track and manage cash flow
 - a. Implement use of a tracking app for
 - i. Savings
 - ii. Income
 - iii. Expenses
 - b. Apply techniques for tracking investments

Learning Outline

Time	Details
8:30 – 9:00 am	Registration
9:00 – 10:30 am	The Flow of Money <ul style="list-style-type: none">• YES! Cash Flow Formula• Key to building wealth• Good Flow vs Bad Flow
10:30 – 10:45 am	Coffee Break
10:45 – 11:30 am	Avoiding Bad Flow <ul style="list-style-type: none">• Getting out of debt• Managing debt• Minimize expense
11:30 – 1:00 pm	Creating Good Flow <ul style="list-style-type: none">• Habits & attitudes• Career planning• Protecting income
1:00 – 2:00 pm	Lunch Break
2:00 – 3:30 pm	Increasing Good Flow <ul style="list-style-type: none">• Increase savings• Improve investments• Choosing appropriate financial products
3:30 – 3:45 pm	Coffee Break
3:45 – 5:00 pm	Tracking Cash Flow <ul style="list-style-type: none">• Income target• Savings target• Expense target• Investment target
5:00 – 5:30 pm	Q&A

Profile of Mr Bose Dasan, CFP, IFP

KP Bose Dasan has been involved in taxation for over 40 years, after an 8 year stint with the Inland Revenue Department and two years as tax manager with HRM. He went to USA in 1986 to study the nascent industry of financial planning, and has been a pioneer in financial planning education in Malaysia ever since. He has written over 60 articles on tax, investment and finance that have appeared in all major magazines including The Edge, Smart Investor, Personal Money, and the FPAM 4E Journal. He holds an economics degree from Universiti Malaya and an MBA from Cranfield University, UK.

He has lectured extensively all over Malaysia and in India and Singapore on his core interest area of investment, tax and financial planning. His mission is to foster financial literacy and through it set a pathway to financial freedom.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	YES! The Feng Shui of Money – Managing Cash Flow to Build Wealth
Facilitators:	KP Bose Dasan
Date:	23 February 2019 / Saturday [full day]
Venue:	Renaissance Hotel at Permas Jaya, Johor Bahru
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.30 pm
Fees:	Normal – RM 255 (FPAM Member), RM 305 (Non-members) The fee includes workshop materials, lunch and refreshments. Special Gift: First 20 person to register with completed forms and payment proof. Valid until 8th Feb 2019
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 or johorchapter@fpam.org.my
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 johorchapter@fpam.org.my Please call Kenney at 013-3368828 & Mohan at 017-7731762.
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!

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