

FPAM WORKSHOP OUTLINE



Title: The Art of Constructing Investment Portfolio
Date: 24 August 2019, Saturday (Half Day)
Venue: Ponderosa Golf and Country Club, Johor
Points: 5 CPE Points / 5 CE Points / 4 CPD Points
Facilitator: Pauline Yong

Learning Outcome

Participants will be able to:

1. Demonstrate essential needs of investment planning as a management pillar of financial planning.
2. To understand the portfolio theories and their step in constructing a portfolio.
3. Apply the portfolio building concepts to build investment portfolios that meet clients' financial goals.

Learning Outline

Time	Details
8:30 - 9:00 am	Registration
9.0 – 10.15 am	1. Understanding The Portfolio Theories Concepts <ul style="list-style-type: none">• Modern Portfolio Theory vs Capital Asset Pricing Model• Determine the optimal portfolio that cater for individual risk and return• Learn how to price asset prices using CAPM Model
10.15-10.30am	Tea break
10.30-11.30am	2. Steps In Constructing A Portfolio <ul style="list-style-type: none">• The 5 steps in constructing a portfolio• Cycle of market emotions and how we can overcome this.• Recommend the right asset allocation to the clients according to their situations.

11.30-12.30pm	3. Group Activity: Construct Investment Portfolio For Clients <ul style="list-style-type: none">• Case studies: To design investment portfolios for individuals with different financial needs.
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Profile of Ms Pauline Yong, CFP

Pauline Yong Tung Fong has 20 years of experience in the equity market and 10 years of financial planning experience, with a specialty in investment planning. She holds the following professional qualifications: a Financial Planning Representative (a CMSRL license holder), a Financial Advisor Representative (FAR), and a Certified Financial Technician (CFTe). As a speaker, Pauline has been conducting regular financial planning and investment classes for corporates, investment banks, colleges, FPAM and other non-profit organisations.

Her passion is to promote investment education by contributing regular articles to various media and magazines. To date, Pauline has published 5 investment and financial planning books in Malaysia and Singapore.

Pauline graduated with Bachelor's Degree in Business Administration (Finance) from York University and Master in Business Administration (Finance) from University of Leicester. She later continued her education by earning the CFP and the CFTe which are professional designations that are well recognised globally.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	The Art Of Constructing Investment Portfolio
Facilitators:	Pauline Yong
Date:	24 August 2019 / Saturday [half day]
Venue:	Ponderosa Golf and Country Club
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 12.30 pm
Fees:	RM 90 (FPAM Member) RM 100 (Non-Member)
CE Points (FPAM): CPE Points (SIDC): CPD Points (FIMM):	Five (5) Five (5) Four (4)
Instructions for Payment/Invoice:	By CASH or Interbank GIRO (IBG) only, please bank into Alliance Bank A/C 1210 9001 0057 503 and email payment proof together with this registration form and e-mail to johorchapter@fpam.org.my . Fees inclusive of ONE tea break and training materials.
Enquiries:	Send e-mail to johorchapter@fpam.org.my or call Kenney at 013-3368828 and Avril at 012-7723292
Terms:	Registration is on a first-come-first-served basis. Only 40 seats available for this workshop . 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** or **Interbank GIRO (IBG)** only, please bank into **Alliance Bank A/C 1210 9001 0057 503** and email payment proof together with this registration form and e-mail to johorchapter@fpam.org.my.

Closing Date for Registration **19th August 2019** *(Only 40 seats available for this workshop)*