FPAM WORKSHOP OUTLINE

Title:	**Building Effective Client Relationship**
Date:	7 September 2019 / Saturday [Full day]
Venue:	Dreamtel Hotel, Kota Kinabalu, Sabah
CPE/CE/CPD:	10 CPE Points / 10 CE Points / 8 CPD Points
Facilitator:	Mr Allen Ang

Learning Outcome

Participants will be able to:

1. Identify clients' behavioral patterns to build trust immediately
2. Leverage on behavioral patterns to establish stronger relationship with clients
3. Acquire skills to efficiently gather financial data from clients
4. Increase the implementation ratio of financial plan by clients
5. Build an effective monitoring system to keep long term relationship with clients

Learning Outline

Time	Details
8:30 - 9:00 am	**Registration**
9:00 - 9:30 am	**Identify clients' behavioral patterns** • Introduction to consumer behavior study • Understand the common challenge to building trust • Identify the behavioral patterns for yourself and clients
9:30- 10:30 am	**Establish stronger relationship with clients (Part 1)** • Understand the general behavior of active clients • Explore what they love and fear when planning for their future • Leverage on their behavioural patterns to build better bonds
10:30 - 11:00 am	**Coffee Break**
11:00 - 12:30 pm	**Establish stronger relationship with clients (Part 2)** • Understand the general behavior of reactive clients • Explore what they love and fear when planning for their future • Leverage on their behavioral patterns to build better bonds
12:30 – 1:30 pm	**Lunch Break**
1:30 – 3:00 pm	**Efficient financial data collection** • Identify different strategy for different clients • Minimize resistance during financial data collection • Acquire communication skills to extract clients' soft data
3.00 – 3.30 pm	**Coffee Break**

3:30 – 4:30 pm	**Increase implementation ratio of financial plan** • Identify the fear factor in clients' objection • Increase clients' confidence of the recommended plan • Utilize motivational strategy to increase implementation ratio
4:30 – 5.00 pm	**Build an effective monitoring system** • Identify what clients seek in a long term relationship • Establish a meaningful long term relationship with clients • Personalize an effective monitoring system for each individual
5:00 - 5:30 pm	**Q&A**

Profile of Mr Allen Ang

Allen Ang is a Senior Insurance Planner with AIA Brunei, a licensed Financial Planner with the Authority Monetary Brunei Darussalam (AMBD), and a CFP with the Financial Planning Association Malaysia (FPAM).

He graduated with a Bachelor of Commerce in Accounting and Finance from Curtin University in 2006. Having begun his career as an Accounts Executive at Nautika Sdn Bhd, Allen later joined Dowell Schlumberger Eastern Inc as a Management Accountant. After 5 years as a back end office staff, he joined AIA Co Ltd as an Insurance Agent in 2010.

Like most new insurance agents, Allen initially struggled to connect with his prospects and took a longer lead time to establish meaningful relationships with clients. In 2012, Allen attended a course on Consumer Behavior and it has transformed the way he conducts business dramatically. Today, Allen is able to reduce his turnaround time (from prospect to client) by as much as 80%.

Allen believes that learning effective people skills is the key to a consistent revenue stream in an inconsistent business climate. In 2016, Allen co-founded a Human Resource Training & Consultancy company - EPIPEOPLE CONSULTANTS, where he trains and empowers young executives as a Certified Behavioral and Career Consultant.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	**Building Effective Client Relationship**
Facilitators:	Allen Ang
Date:	7 September 2019 / Saturday [Full day]
Venue:	Dreamtel Hotel, Kota Kinabalu, Sabah
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.30 pm
Fees:	**Early Bird Special; RM 285 (FPAM Member), RM405 (Non-members) Payment by 30th August 2019.** Normal – RM 325 (FPAM Member), RM 455 (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 30th August 2019 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 Wilfred Lim at 012-813 3005
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 0056 049** and email or fax in bank-in slip
Cheque payable to **Financial Planning Association of Malaysia**. Cheque no.: Amount: RM
Charge my credit card: ☐Visa ☐Mastercard ☐Amex ☐Diners Credit card no.: Expiry date: Amount:
Early Bird Special – By 30th August 2019 / Closing Date – 4th Sept 2019

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