FPAM WORKSHOP OUTLINE

Title:	**Impact of Technology on FP/FA Firm and Its Registered/Licensed Representative**
Date:	5 October 2019, Saturday (Full day)
Venue:	The Pines Hotel, Melaka
Points:	10 CPE Points / 10 CE Points / 6 CPD Points
Facilitator:	Mr. Stephen Yong

Learning Outcome

Participants will be able to:

1. Define what is Financial Technology (FinTech)
2. Recognize the current and potential impact of FinTech on the FP/FA industry in Malaysia
3. Classify the types of FinTech in the financial planning industry
4. Leverage on FinTech to enhance the LFP/FAR role and functionality

Learning Outline

Time	Details
8.30 - 9.00 am	**Registration**
9:00 - 10:00am	1. What is Financial Technology (FinTech)? • Definition of FinTech, and the scope of the environment • Example of FinTech in financial planning (e.g. robo-advisory, P2P, digital currency, digital brokers)
10.00 - 11.00am	2. Managing the current and potential impact of FinTech on FP/FA industry in Malaysia • Current impact of FinTech on FP/FA industry • Potential impact of FinTech on FP/FA industry
11.00 - 11.30am	**Coffee Break**
11:30 - 12:30pm	3. Types of FinTech in the related industry that LFP and FAR need to be aware of:- a. Peer to Peer (P2P) Financing b. Insurance c. Equity Crowdfunding
12.30 - 1.30pm	**Lunch Break**
1.30 - 2.30pm	4. Leveraging on FinTech to enhance LFP/FAR role and functionality • Changing customer behaviour • Advantages of FinTech to this industry • How FinTech enhances LFP/FAR's interactions with clients

Time	Details
2.30 - 3.00pm	**Coffee break**
3.00 - 5.00pm	5. Case for discussion on new and innovative solutions from Fintech and how those interact with LFP/FAR role
5.00 – 5.30pm	**Q&A**

Profile of **Stephen Yong Chuan Seong (MyPF Founder & CEO; Licensed Financial Planner)**

Stephen (friends call him Stev) is the Founder & CEO of MyPF.my, and a Licensed Financial Planner. He started MyPF.my 7 years ago as an online financial education portal which today leverages on fintech to connect clients to financial planners and solutions. Today, MyPF.my is a leading personal finance site in Malaysia, and was recently awarded the Excellence in Finance - Companies award by FiNext.

Stev is also the Chief Knowledge Officer at Wealth Vantage Advisory Sdn. Bhd. (WVA). His roles and responsibilities include helping financial planners and staff benefit from knowledge resources, building firm knowledge creation and culture, and actively promoting knowledge agenda within and beyond the firm.

Stev believes in simplicity, growth and value for his passions: people, personal finance, and business processes. He practices what he shares, recommends what he uses, and is a long-term investor for close to two decades now.

Stev's (and MyPF's) mission is to help people simplify personal finances - to help people grow and achieve financial independence. All this so people can have the freedom of choice – to focus on who and what truly matters in their lives.

Stev has a Bachelors in Computer Science, MBA, and Certificate in Financial Planning (Cert TM). He brings with him real-world business experience from his previous roles as a senior division manager, business development manager, and trainer-facilitator in the tech industry.

Besides working, Stev enjoys spending time with his better half, reading, writing, travelling, and drinking (two cups of coffee) daily.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	**Impact of Technology on FP/FA Firm and Its Registered/Licensed Representative**
Facilitator:	Mr. Stephen Yong
Date:	5 October 2019 / Saturday [full day]
Venue:	The Pines Hotel, Melaka
Registration:	8.30 am – 9.00 am
Time:	9.00 am – 5.00 pm
Fees:	Normal – RM 150. Open to all Licensed Financial Planners (LFPs) and Financial Adviser Representatives (FARs) who are current members of FPAM, AFA, MFPAA and MFPC. Fee includes seminar materials, buffet lunch and refreshments.
CE Points (FPAM): CPE Points (SIDC): CPD Points (FIMM):	Ten (10) Ten (10) Six (6)
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to events@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 call Sabria 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:			
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Closing Date – 4th October 2019 EMAIL: events@fpam.org.my / FAX: +603 7954 9400