

FPAM CE WORKSHOP OUTLINE



Title: Financial Planning for Millennials & Gen-Z
Date: 23 November 2019 / 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: Mr Alvin Kwan Tzen Yet

Learning Outcome

Participants will be able to:

- Develop a holistic financial plan for the new generations that incorporate the major elements of financial planning.
- Apply new financial planning concepts and methods into the existing financial planning process to cater for the changes in the new generations
- Identify and apply the current behavioral trends of the new generations to the financial planning process
- Identify and apply the current market trends in the context of savings, investments and insurance to the financial planning process that relates to the new generations the most.

Learning Outline

Time	Details
8:30 - 9:00 am	Registration
9:00 - 9:30 am	Understanding & Analyzing Your Young Client's Demographic in the Financial Planning Process <ul style="list-style-type: none">• Malaysian current demographics statistics• Current and Future Millennial and Gen-Z's behavioral and social trends in<ol style="list-style-type: none">i) Spendingii) Savingiii) Investmentsiv) Insurancev) Estate Planning• Personal reflection on experience and encounters with young clients (or whatever similar)<ul style="list-style-type: none">- Setup for discussion later.

9:30 – 10:15 am	Exploring the issues (group discussion) Defining the issues and suggest approaches <ul style="list-style-type: none"> • Breaking down the issues and problems • Classifying the problems into themes. Suggest solutions and critically evaluate opinions
10:15– 10:45 am	Coffee Break
10:45 – 12:30 pm	How to financially plan for year 2050 - Part 1 <ul style="list-style-type: none"> • Planning for 2050 retirement. • Planning for estate planning for young demographics. • How to save and manage risk for 2050
12.30– 1:30 pm	Lunch
1.30 – 2:30 pm	How to financially plan for year 2050 - Part 2 <ul style="list-style-type: none"> • Critique of current assumptions used in financial planning process • Importance of constant reassessment. • Financial Planning process for Millennials and Gen-Z
2:30 - 3:30 pm	Approaching the young demographic <ul style="list-style-type: none"> • Overcoming the stereotype • Taking advantage of technology • Preference of non-face-to-face communication. • Information at their fingertips
3:30 – 3:45 pm	Coffee Break
3.45 – 5.00 pm	Bringing it all together (group discussion) <ul style="list-style-type: none"> • Case study • Summarizing problems and issues

Profile of Mr. Alvin Kwan

Alvin Kwan is a CFP and an academic development specialist in Taylor's University with expertise in the field of financial planning and investments. Previously, he was a lecturer in Sunway University, teaching accounting and finance undergraduates in areas of portfolio management, financial institutions and markets as well as derivatives. He acquired his Master of Financial Planning from Curtin University, Western Australia in 2009 specializing in Australian superannuation, risk management, investments and taxation. Apart from being in academics, he is also a senior investment consultant for Affin Hwang Asset Management. Prior to teaching, he has working experience in private banking and stock broking where he dealt with various forms of capital markets investment strategies for high net-worth individuals.

CE WORKSHOP REGISTRATION FORM / INVOICE

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Facilitator:	Mr Alvin Kwan Tzen Yet
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Venue:	Rafflesia 1, Sime Darby Convention Centre, Kuala Lumpur
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 15th November 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 13th November 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 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!

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