

# FPAM WORKSHOP OUTLINE



**Title:** Constructing a Financial Plan – A Practical Approach  
**Date:** 29 February 2020 / 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:** Kevin Neoh Kian Ming

## Learning Outcome

Participants will be able to:

1. Apply financial plan writing practice and distinguish from traditional practice.
2. Develop mindset of delivering holistic financial plan and determine value of writing the plan.
3. Apply the know-how of marketing financial planning service and writing a plan to appropriate client.
4. Apply 6 steps of financial planning process.
5. Apply the key skills of writing a quality and comprehensive financial plan.

## Learning Outline

Time	Details
8:30 - 9:00 am	<b>Registration</b>
9:00 - 10:30 am	<b>Setting and Develop Right Mindset and Marketing for Financial Planning Practice</b> <ul style="list-style-type: none"><li>• Identify challenges that block you from practicing financial planning</li><li>• Identify and constructing the ideal client profile for marketing of financial planning service</li><li>• Identify the value of Financial Planning and how it enhance the client</li></ul>
10:30 - 10:45 am	<b>Coffee Break</b>
10:45 - 1:00 pm	<b>Marketing Plan and Engagement Process for Financial Planning Service</b> <ul style="list-style-type: none"><li>• Brainstorm and identify the marketing script and message that is suitable to the ideal client.</li><li>• Introduce FPSB 6 Steps of Financial Planning Process</li><li>• Practical approach to engagement process and on boarding a prospect as client.</li><li>• Documentations and assessment required for financial planning process</li></ul>
1:00 - 2:00 pm	<b>Lunch Break</b>

<b>Time</b>	<b>Details</b>
2:00 - 3:30 pm	<b>Constructing A Financial Plan - Case study (Group Discussion)</b> <ul style="list-style-type: none"> <li>• Data processing and generating financial plan</li> <li>• Recommendations and Action Plan</li> <li>• Identify areas of improvement in constructing financial plan</li> </ul>
3:30 - 3:45 pm	<b>Coffee Break</b>
3:45 – 4:30 pm	<b>Presentation of Case Study Financial Plan</b> <ul style="list-style-type: none"> <li>• Presentation of case study outcome.</li> <li>• Identify the strength and weaknesses of the process for improvement.</li> </ul>
4:30 - 5:00 pm	<b>Practice Model and Mentorship</b> <ul style="list-style-type: none"> <li>• Understand expected quality for outstanding plan.</li> <li>• Identify the practice model that is suitable for your ideal client and practice objective.</li> <li>• Identify the potential benefits of working with a mentor.</li> </ul>
5:00 - 5:30 pm	<b>Q &amp; A</b>

### ***Profile of Kevin Neoh Kian Ming, CFP***

Kevin is a holder of the Capital Market Services Representative License, and Financial Adviser Representative license issued by Securities Commission Malaysia and Bank Negara Malaysia.

He practices financial planning and advisory at VKA Wealth Planners Sdn. Bhd, a Malaysian home grown leading financial planning firm that aspire to become Malaysian Top Choice Comprehensive Financial Planning firm.

Kevin is a firm believer that through effective financial management we will be able to take charge of our life and be able to pursuit our life goals, and dreams and realizing those dreams that really matter to us.

When he was at a cross-road prior to graduating from his undergraduate study in Biochemistry, he began to think about having a meaningful work that can yield satisfaction and make a difference in people lives. As a person without proper financial education and weak in financial literacy and aspired by the impact of how sound financial advice can improve a person’s life, Kevin decided then set his sight on becoming a professional Financial Planner.

He began his venture as a life insurance advisor with an established and renowned life insurance company, while he work to improve his competency and knowledge of the financial services industry as well as polishing his soft skills and pursuing his certification. In the first five years of his career, he graduated from his Master in Business Administration (MBA) and subsequently become a Licensed Financial Planner after completing his RFP and CFP certification.

Kevin was also the Winner of the Malaysian Financial Planner of the Year Award (MFPYA) 2016 & 2017, which is led by Financial Planning Association of Malaysia in collaboration with all regulator - recognized financial planning associations in Malaysia.

As a proactive person who looks to connect people to a financially fulfilling life, Kevin actively shares his view and knowledge to the public via public seminar, writing of column and have it published on personal finance magazine, newspaper and contribute his opinions during media enquiry and interview.

## CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	<b>Constructing a Financial Plan – A Practical Approach</b>		
Facilitators:	Kevin Neoh Kian Ming		
Date:	29 February 2020 / Saturday [full day]		
Venue:	Rafflesia 1, Sime Darby Convention Centre, Kuala Lumpur		
Time:	9.00 am – 5.30 pm ( <i>Registration by 8.30am</i> )		
Fees:	<b>Early Bird Special; RM 285 (FPAM Member), RM405 (Non-members)</b> <b>Payment by 21<sup>st</sup> February 2020.</b> Normal – RM 325 (FPAM Member), RM 455 (Non-members) <i>The fee includes workshop materials, lunch and refreshments.</i>		
Points:	FPAM CE Points	SIDC CPE Points	FiMM CPD Points
	10	10	8
	<i>FPAM CE Points recognized by BNM for FAR licensed renewal.</i>		
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to <a href="mailto:events@fpam.org.my">events@fpam.org.my</a> by <b>21st February 2020</b> to enjoy early bird rate.		
Payment/Invoice:	<b>By cheque:</b> 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. <b>By credit card:</b> 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 <a href="mailto:events@fpam.org.my">events@fpam.org.my</a> or call Bey at +603 7954 9500		
Terms:	<ul style="list-style-type: none"> <li>Registration is on a first-come-first-served basis.</li> <li>Confirmation is subject to payment before the course.</li> <li>Walk-in participant/s will be admitted on the basis of space availability.</li> <li>FPAM reserves the right to amend the program, speaker, date, venue, etc without prior notice.</li> </ul>		

### YES, PLEASE REGISTER ME!

Name:		Dietary:	Vegetarian / Non-vegetarian
IC No.:		FPAM No. :	
Company Name & Address:			
E-mail:		Telephone:	
SC Licence / ERP No / FiMM No.:		Mobile:	
Emergency Contact Person:		Telephone:	

### Mode of Payment

By cash, please bank into <b>Alliance Bank A/C 1210 9001 0005 395</b> and email or fax in bank-in slip	
Cheque payable to <b>Financial Planning Association of Malaysia</b> .	
Cheque no.:	Amount: RM
Charge my credit card: <input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/> Amex <input type="checkbox"/> Diners	
Credit card no.:	Expiry date:
Amount :	

**Early Bird Special – By 21st February 2020 | Closing Date – 26<sup>th</sup> February 2019**

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