

# FPAM WORKSHOP OUTLINE



**Title:** Business Continuity for Family and Non Family Business

**Date:** 25 July 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

**Facilitators:** Mr Azhar Iskandar Hew

## Learning Outcome

Participants will be able to:

1. Identify the different business structures in Malaysia and explain which business structures including listed companies and ownership suitable for business continuity
2. Understand and analyze the problems faced by business owner's especially major shareholders of listed companies and their heirs when a business owner exits the business due to death, total permanent disability, comatose, disappearance or mental incapacity.
3. Able to determine which business continuity plan is suitable for the business owners of a listed and non-listed company – a buy-sell arrangement, family business succession trust or a family business foundation.
4. Able to explain the type of business continuity plan to be adopted by the business owners - a buy-sell arrangement, family business succession trust or a family business foundation.
5. Understand and present the advantages and disadvantages of the different business continuity plan using a buy-sell arrangement, family business succession trust or a family business foundation.

## Learning Outline

Time	Detail
8:30am - 9:00 am	<b>Registration</b>
9:00am - 9:45 am	<b>Business Structures in Malaysia</b> <ul style="list-style-type: none"><li>• An introduction to sole proprietorship, general partnership, limited liability partnership, private limited companies and limited companies in Malaysia</li><li>• Identify the suitable business structures and ownership for business continuity</li></ul>

9:45am - 10:30 am	<p><b>Business Continuity Problems</b></p> <ul style="list-style-type: none"> <li>• When the exit of a business owner is not planned or unexpected due to death, disappearance, total permanent disability, mental incapacity and comatose: <ul style="list-style-type: none"> <li>i) What happens to the business interest or shareholding; and</li> <li>ii) What are the problems faced by heirs and the remaining business owners.</li> </ul> </li> <li>• When the exit of a business owner is due for retirement, what would be issues involved for the heirs and remaining business owners.</li> </ul>
10:30am-10:45am	<b>TEA BREAK</b>
10.45am – 1.00pm	<p><b>Suitable Business Continuity Plans for Family Owned Business for Private Limited Companies</b></p> <ul style="list-style-type: none"> <li>• This session explains the following: <ul style="list-style-type: none"> <li>i) the usage of family business succession trust and family business foundation, the structures and the differences between them</li> <li>ii) the required shareholding for such a succession plan, the value of the business, the readiness and leadership transfer to the successor, and inclusiveness of family members into the business</li> <li>iii) Case study</li> <li>iv) Advantages and disadvantages of a family business succession trust and family business foundation</li> </ul> </li> </ul>
1.00pm - 2.00pm	<b>LUNCH</b>
2.00pm –3.00pm	<p><b>Suitable Business Continuity Plans for Family Owned Business for Listed Companies</b></p> <ul style="list-style-type: none"> <li>• This session explains the following: <ul style="list-style-type: none"> <li>i) the usage of family business succession trust and family business foundation, the structures and the differences between them</li> <li>ii) the required shareholding for such a succession plan, the value of the business, the readiness and leadership transfer to the successor, and inclusiveness of family members into the business</li> <li>iii) Case study</li> <li>Advantages and disadvantages of a family business succession trust and family business foundation</li> </ul> </li> </ul>

3.30pm – 3.30pm	<p><b>Suitable Business Continuity Plans for Non-Family Owned Business</b></p> <ul style="list-style-type: none"> <li>• This session explains the following: <ul style="list-style-type: none"> <li>i) the usage of will and a buy-sell arrangement</li> <li>ii) the structure and components of a buy-sell arrangement</li> <li>iii) the matters to be agreed upon by the business owners – determination of business value, funding for the buy-out, who would be the intended purchaser and whether to use a buy-sell agreement or cross option agreement</li> <li>iv) the purpose of the power of attorney and trust in the buy-sell arrangement</li> <li>v) Case study Advantages and disadvantages of a buy-sell arrangement</li> </ul> </li> </ul>
3:30pm - 3:45pm	<b>TEA BREAK</b>
3.45pm – 5.00pm	<p><b>Suitable Business Continuity Plans for Non-Family Owned Business (continuation)</b></p> <ul style="list-style-type: none"> <li>• This session explains the following: <ul style="list-style-type: none"> <li>i) the usage of will and a buy-sell arrangement</li> <li>ii) the structure and components of a buy-sell arrangement</li> <li>iii) the matters to be agreed upon by the business owners – determination of business value, funding for the buy-out, who would be the intended purchaser and whether to use a buy-sell agreement or cross option agreement</li> <li>iv) the purpose of the power of attorney and trust in the buy-sell arrangement</li> <li>v) Case study Advantages and disadvantages of a buy-sell arrangement</li> </ul> </li> </ul>

***Profile of Mr. Azhar Iskandar Bin Hew,***

En. Azhar Iskandar Hew is the Deputy Chief Executive Officer of Rockwills Trustee Berhad and holds the Bachelor of Laws (Honours) degree from the University of London. He is a Director of Rockwills Advisory Services Sdn Bhd. He is also a member of the Society of Trust and Estate Practitioners (STEP) and is an Associate Financial Planner (AFP) holder.

He has more than 18 years' experience in the estate planning industry as a will & trust specialist, trainer and conference speaker. Over the years he has trained more than 10,000 people primarily from leading financial institutions and life insurance companies as well as financial planners in Malaysia, Hong Kong and Singapore.

He is approved by Securities Industry Development Centre (SIDC) as a facilitator to conduct estate planning training and is an Estate Planning Trainer for Certified Financial Planning (CFP) as well as a facilitator for estate planning courses organized by The Federation of Investment Managers Malaysia (FIMM).

His current scope of work includes advising on legal aspects, compliance and advisory matters regarding Estate Planning and Private Trust services. He was a regular article contributor to Smart Investor and Malaysian Business on the areas of Estate Planning and Private Trust.

## CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	<b>Business Continuity for Family and Non Family Business</b>		
Facilitator:	Mr Azhar Iskandar Hew		
Date:	25 July 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; RM285 (FPAM Member), RM405 (Non-members)</b> <b>Payment by 17<sup>th</sup> July 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
	<b>10</b>	<b>10</b>	<b>8</b>
	<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>17<sup>th</sup> July 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:	<ul style="list-style-type: none"> <li>Send e-mail to <a href="mailto:events@fpam.org.my">events@fpam.org.my</a> or call Bey at 03-7954 9500.</li> </ul>		
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 – By 17<sup>th</sup> July 2020 | Closing Date – 21<sup>th</sup> July 2020

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