FPAM COURSE OUTLINE

Title: **Investing For Life Goals - A Portfolio Perspective**
Date: 28 March 2020 / Saturday [Full day]
Venue: The Pines Melaka
CPE/CE/CPD: 10 CPE Points / 10 CE Points / 8 CPD Points
Facilitators: Pauline Yong

Learning Outcome
Participants will be able to:

1. Demonstrate essential needs of investment planning as a management pillar of financial planning.
2. Explain and advise more effectively on the various financial products features to suit the needs of both existing and potential customers.
3. To understand the different asset classes and their expected returns.
4. Apply the portfolio building concepts to build investment portfolios that meet clients' financial goals.

Learning Outline

Time	Details
8:30 - 9:00 am	**Registration**
9:00 - 9:30 am	**Investment Objectives and Financial Goals** • Overview of investment planning • Life goals in different stages of life • Calculation for retirement funds, education funds and other financial goals.
9:30 – 10:30 am	**Applying Risk Profiling**
10:30 - 10:45 am	**Coffee break**
10.45 – 11.30am	**Retirement Challenges**
11.30 – 1.00 pm	**Assets Classes** • Equidity • Bonds • Derivatives
1:00 - 2:00 pm	**Lunch Break**

Time	Details
2.00 - 3.30 pm	**Understanding The Portfolio Theories Concepts** • Modern Portfolio Theory vs Capital Asset Pricing Model • The optimal portfolio that cater for individual risk and return • Think long term
3.30 - 3.45 pm	**Coffee Break**
3.45 - 5.00 pm	**Steps in Constructing A Portfolio** • The 5 steps in constructing a portfolio • Cycle of market emotions and how we can overcome this. • Recommend the right asset allocation to the clients according to their situations.
5:00 - 5.30 pm	**Q & A**

Profile of Pauline Yong, CFP

Pauline Yong Tung Fong has 20 years of experience in the equity market and 10 years of financial planning experience, with a specialty in investment planning. She holds the following professional qualifications: a Financial Planning Representative (a CMSRL license holder), a Financial Advisor Representative (FAR), and a Certified Financial Technician (CFTe). As a speaker, Pauline has been conducting regular financial planning and investment classes for corporates, investment banks, colleges, FPAM and other non-profit organisations.

Her passion is to promote investment education by contributing regular articles to various media and magazines. To date, Pauline has published 5 investment and financial planning books in Malaysia and Singapore.

Pauline graduated with Bachelor’s Degree in Business Administration (Finance) from York University and Master in Business Administration (Finance) from University of Leicester. She later continued her education by earning the CFP and the CFTe which are professional designations that are well recognised globally.

CE WORKSHOP REGISTRATION FORM / INVOICE

Title of Workshop:	**Investing For Life Goals - A Portfolio Perspective**		
Facilitators:	Pauline Yong		
Date:	28 March 2020 / Saturday [full day]		
Venue:	The Pines Melaka		
Time:	9.00 am – 5.30 pm *(Registration by 8.30am)*		
Fees:	**Early Bird Special; RM205 (FPAM Member), RM255 (Non-members)** **Payment by 13th March 2020.** Normal – RM 255 (FPAM Member), RM 305 (Non-members) *The fee includes workshop materials, lunch and refreshments.*		
Points	FPAM CE Points	SIDC CPE Points	FiMM CPD Points
	10	**10**	**8**
	FPAM CE Points recognized by BNM for FAR licensed renewal.		
Instructions:	Please fill-up this form and fax to +603 7954 9400 or e-mail to melakachapter@fpam.org.my ; CC events@fpam.org.my by **13th March 2020**.		
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 melakachapter@fpam.org.my • Please call Bey at 03-7954 9500 or Keh at 012-373 0605 for more information.		
Terms:	• Registration is on a first-come-first-served basis. • Confirmation is subject to payment before the workshop. • 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:		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 **Alliance Bank A/C 1210 9001 0056 051** 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 – By 13th March 2020 | Closing Date – 25th March 2020

EMAIL: melakachapter@fpam.org.my ; CC : events@fpam.org.my | FAX: +603 7954 9400