FINANCIAL TALENTHOUSE by **ARECA CAPITAL SDN BHD** in collaboration with FPAM and FiMM.

INSURANCE PLANNING & ESTATE PLANNING WORKSHOP

Gateway towards obtaining your CFP certification with FPAM, the workshop also functions as a fast-track for participants towards obtaining a CMSRL in Financial Planning with the Securities Commission.

WHY YOU SHOULD ATTEND THIS WORKSHOP?

Insurance Planning and Estate Planning are invaluable skills for any serious Financial Planner looking to add value for their clients. Module 2 will be covered extensively in these series of workshops, which take place over 6 days.

WHO SHOULD ATTEND THIS COURSE:

Unit Trust & PRS Consultants, Financial Planners, Bankers, Insurance Agent and working adults with Degree/Diploma (Participants must be a Trade/Associate member of FPAM)

LEARNING OBJECTIVES:

Understand the fundamental concepts of risk management through insurance and estate planning. The workshop will cover these concepts as well as the various tools used, such as life insurance, general insurance, wills, power of attorney and trusts.

From there, participants will then apply the concepts and be able to formulate appropriate risk management techniques in designing a more holistic financial plan for their clients

Dates: 4^{th} & 5^{th} Nov, 18^{th} & 19^{th} Nov, 9^{th} & 10^{th} Dec(all Saturday and Sundays)
Venue: **Areca Capital Sdn Bhd**
Board Room – Level 6, 107, Block B, Pusat Dagangan Phileo Damansara 1
No.9, Jalan 16/11, Off Jalan Damansara,
46350 Petaling Jaya, Selangor
Time: Full day workshop (8.30am – 5.30pm)
Fees: Normal –RM1900
*Fees exclude lunch. Light refreshment will be provided.

WORKSHOP SCHEDULE AND TOPICS:

Day 1
Topic 1 – Fundamental Concepts in Risk Management
Topic 2 – Insurance Fundamentals
Day 2
Topic 3 – Legal Principles in Insurance
Topic 4 – The role of Insurance in Financial Planning
Day 3
Topic 5 – Factors affecting Life Insurance Needs
Topic 6 – Understanding Life Insurance Policy Contracts
Topic 7 – General Insurance Policy Contracts

Day 4
Topic 8 – Health Insurance
Topic 9 – Annuity Policy Contracts
Day 5
Topic 10 – Legislation and Rules in the Insurance Industry
Topic 11 – Consumer Protection and Insurance Industry Codes of Practice
Topic 12 – Estate Planning Fundamentals
Day 6
Topic 13 – Wills and Will Planning
Topic 14 – Trusts
Topic 15 – Powers of Attorney
Topic 16 – Duties and Power of the Personal Representative
Topic 17 – Special Estate planning issues for business owners

WORKSHOP FACILITATOR:

1) Mr. Jack Lin Kok Leong, MBA, CFP, RFP, SRFP, CMSRL

FINANCIAL TALENTHOUSE by ARECA CAPITAL

This workshop is part of the Financial TalentHouse initiative by Areca Capital. It is a talent-building program designed to attract, develop and upgrade skills for the investment advisory sector. TalentHouse will equip participants with the critical knowledge, soft-skills and relevant licensing and requirements with FPAM, FIMM and SC. Participants will also be offered a management-trainee position in Areca or its partners for on-the-job training while studying. The program seeks to up-skill the existing workforce in the financial distribution channel such as the tied agents.

Upon graduation from the program, the new financial advisors will be provided with necessary infrastructure such as a financial planning software and IT platform with back room functions provided by Areca Capital.

For more enquiries and RSVP, please contact:

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