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

INVESTMENT PLANNING & RETIREMENT 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?

Investment Planning and Retirement Planning are invaluable skills for any serious Financial Planner looking to add value for their clients. Module 3 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:

Participants will have a better understanding of the concepts of investment planning and personal investment portfolio management. The concept of risk and return will also be discussed as well as ways for optimizing investment returns with the various types of asset classes available.

The workshop covers the importance of personal retirement maps to suit client objectives and lifestyles, the basic guidelines of retirement planning and common pitfalls and misconceptions of retirement. Method of identifying retirement costs and income needs of clients and various forms of retirement savings options and income streams are also discussed.

Dates: 6th & 7th of May, 13th & 14th of May, 20th & 21st of May (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 **Early Bird Special (By 17th April – RM1710)**
*Fees exclude lunch. Light refreshment will be provided.

WORKSHOP SCHEDULE AND TOPICS:

Day 1 – 6th May
Topic 1 – Investment Concepts ○ Why do people invest? ○ Measurement of investment returns ○ Minimising risk ○ Portfolio Management process for individual investors
Topic 2 – Concept of Portfolio Theory and performance measurement
Day 2 – 7th May
Topic 3 – Equity Market
Topic 4 – Investment in debt securities
Day 3 – 13th May
Topic 5 – Derivatives and structured products
Topic 6 – Collective Investment Schemes and Unit Trust
Topic 7 – Real Estate Investments

Day 4 – 14th May
Topic 8 – Investment for Retirement
Topic 9 – Underlying principles of Retirement Planning
Day 5 – 20th May
Topic 10 – Retirement Scheme
Topic 11 – The Employee Provident Fund (EPF) and Private Retirement Scheme (PRS)
Topic 12 – Retirement Income Streams
Day 6 – 21st May
Topic 13 – Role of Financial Planner in pre-retirement counseling
Topic 14 – Revision and Exercise

WORKSHOP FACILITATOR: Mr. Kong Kim Heng C.A. (M), CFP, IFP, AMAICSA, ACTIM

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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