

## TAX 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.

\*Participants who have passed their CUTE or PRS examination will be exempted from Module 1 in CFP\*

### WHY YOU SHOULD ATTEND THIS WORKSHOP?

The growing affluence and sophistication of the investing public means that it is crucial for Financial Planners to stay ahead of their game. Whether as an added value for your clients or to differentiate yourself from other Financial Planners, we see taxation planning as an invaluable skill as part of a Financial Planner's Unique Selling Proposition (USP).

Incorporate these tax planning strategies in formulating your next financial plan. A proper tax planning strategy ultimately translates to tax-savings, and the amount can be significant over the long term.

### WHO SHOULD ATTEND THIS COURSE:

Unit Trust & PRS Consultants, Financial Planners, Bankers, Insurance Agent and working adults with Degree/Diploma.

### LEARNING OBJECTIVES:

This 2-day comprehensive workshop aims to familiarize participants with Malaysian Taxation System and its compliance for the purpose of tax planning. Participants will have a better understanding of the definition of income, types of income and how deductions and rebates can help to alleviate the income tax burden as well as through minimization and deferment of income taxation.

Furthermore, participants will understand that significant savings could be made through proper tax planning for employees and also for businesses. In addition, participants will understand how relief and rebates can be used for tax planning purposes.

**Dates:** 29<sup>th</sup> & 30<sup>th</sup> April 2017 (Saturday & Sunday)

**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:** RM600 \*Fees exclude lunch. Light refreshment will be provided\*

**FiMM:** 8 CPD Points

## WORKSHOP TOPICS:

<b>1. BUDGET 2016</b>
<b>2. MALAYSIAN TAXATION</b>
Income Tax Concept
Features of the Malaysian Tax System
Direct vs Indirect Tax Structures
Basis of assessment
Residency Rules
Calculation of gross income: <ul style="list-style-type: none"><li>• Salary income</li><li>• Investment income</li><li>• Income from properties</li><li>• Income from business or profession</li><li>• Other sources of income</li></ul>
Deductions
Reliefs
Tax computation

<b>3. REAL PROPERTY GAINS TAX</b>
<b>4. TAX PLANNING</b>
Need and importance of tax planning
Tax avoidance and tax evasion
Tax planning for employees and businesses
Deferral of tax liability
Splitting of income
Managing losses
Maximisation of deductible expenditures of individuals and business forms

**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.

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