Personal financial planning: An inverted framework

20 May 2017 (Saturday), DoubleTree by Hilton Johor Bahru

T&Y Consultancy

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Personal financial planning: An inverted framework

Personal financial planning has grown and evolved considerably over the past several years. The field hardly existed just four decades ago. Practitioners must demonstrate proficiency relative to a broad range of content areas, from retirement planning and estate planning to insurance, taxation, and investments. Within all of this complexity, financial planners are also required to communicate with the client in an effective manner. This course will prepare you for the challenges of any financial planning assignment.

LEARNING OUTCOMES

Upon completion of this program, participants will be able to:

- Describe the personal financial planning process.
- Identify opportunities and challenges related to the cash inflows and outflows.
- Analyse the various sources of borrowing.
- Analyse the degree of risk and loss aversion.
- Compare the characteristics of all asset classes.
- Identify and evaluate the assumptions used in analysing retirement needs.

METHODOLOGY

Harvard Business School's case study methodology, group discussion, powerpoint presentation and quote.

WHO SHOULD ATTEND

- CFO/ financial controllers
- Fund managers
- Remisiers
- CMSRL/ ERP holders
- Corporate financial advisors
- Research analysts
- Bankers

FACILITATOR

TEY SAY YONG OLIVER
B.ACC (SG), MBA (AU), FCCA (UK), AFA (USA), CA (MY), CTIM (MY)

Oliver is the Principal Consultant at T&Y Corporate Consultancy Sdn. Bhd., providing professional development courses and consultancy services in financial management. He has over twenty years' experience with significant exposure in directing financial functions for large multinational companies.

His past appointments include the positions of Treasury Manager (Asia Pacific) with an Irish-based MNC, Project Controller with a Swiss-based MNC and a Research Fellow in corporate finance with a large Australian university. He is a Human Resource Development Fund (HRDF) certified trainer and teaches MBA programme at Raffles University. Oliver also conducts certified finance courses for the Securities Industry Development Corporation (SIDC). His training customer portfolio includes Fortune Global 500 companies and emerging regional firms. He has conducted public, in-house and HRDF claimable trainings.

Oliver is a Fellow Member of the Association of Chartered Certified Accountants (FCCA), a Chartered Accountant of the Malaysian Institute of Accountants (MIA) and an Associate Member of Chartered Tax Institute of Malaysia (CTIM). Oliver is also a Member of the American Finance Association (AFA). He holds a Master of Business Administration (UniSA) and a Bachelor of Accountancy (Nanyang).

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COURSE OUTLINE

DAY 1

SESSION 1

OVERVIEW OF THE FINANCIAL PLANNING FRAMEWORK

- Financial planning process
- Attitudes, values, biases, and behavioural finance
- Types of investment risk
- Asset allocation and portfolio diversification
- Portfolio development and analysis
- Investment strategies
- Alternative investments
- *Harvard's case study 1: The American dream*
- *Harvard's case study 2: To buy or what to buy: Your first home*

DAY 1

SESSION 2

ADVANCED FINANCIAL PLANNING TECHNIQUES

- Retirement income and distribution strategies
- Insurance planning and needs analysis
- Analysis and evaluation of risk exposures
- Health insurance and health cost management
- Tax reduction/ management techniques
- Tax consequences of property transactions
- Develop own personal financial plan
- *Harvard's case study 3: Vanguard Group, Inc., in 2006 and target retirement funds*
- *Harvard's case study 4: Choosing a charitable giving vehicle*

Registration Form

You may either register online at www.tnyconsultancy.com/pfp or fill up the registration form and email back to us.

Course title	Personal financial planning: An inverted framework
Course date	20 May 2017
Venue	DoubleTree by Hilton, Johor Bahru
Registration	8:30AM to 9:00AM
Time	9:00AM to 5:00PM
Fees	RM 300.00 for ERP and CMSRL members
	RM 400.00 for members of accounting and finance associations
	RM 500.00 for non-members
SIDC Points / CPD Hours	10 CPE points/ 8 CPD hours
Terms and conditions	1. T&Y Corporate Consultancy Sdn. Bhd. only recognises reservation upon valid payment. 2. T&Y Corporate Consultancy Sdn. Bhd. has a non-refund policy. Transfer to other programme is allowed within 3 months from the registration date. A replacement person with the same course is allowed. 3. Cancellation made within 7 calendar days before the event date will not be refunded. 4. Registration will be closed 7 calendar days before the event date. 5. T&Y Corporate Consultancy Sdn. Bhd. reserves the right to change the venue, alter the speaker(s), cancel/postpone this programme without further notice. Any payment made will be refunded in full should the programme be cancelled.

Participant details to be fully completed for the issuance of certificate of attendance.
Complete this form and email to serena.yap@tnyconsultancy.com.
For further enquiry, please call 016-9245319.

Full name	
Position	
NRIC/ passport no.	
Company's name	
Email address	
Phone no.	
Mobile no.	
SC License/ CMSRL no.	
Accounting and finance associations membership no.	
Business postal address	
Vegetarian diet	☐ Yes ☐ No
Payment Mode	☐ 1. Cheque made payable to "T&Y Corporate Consultancy Sdn. Bhd."
	☐ 2. Bank into Alliance Bank Malaysia Bhd. A/C no.:011670010031567 with bank-in-slip send to serena.yap@tnyconsultancy.com
	☐ 3. Cash payment
	☐ 4. Credit card at www.tnyconsultancy.com

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