Tax planning for individuals / sole proprietors and investors

29 March 2018 (Thursday), Renaissance Hotel, Johor Bahru

Please register online at www.tnyconsultancy.com/tpfispaijb

T&Y Consultancy
Think the Business

Contact: Oliver Tey
Mobile: 016-9245319
Email: oliver.tey@tnyconsultancy.com
Address: T&Y Corporate Consultancy Sdn. Bhd.
No.21-2, Jalan Molek 3/20, 81100 Johor Bahru, Johor

Credits points under CPD and CPE programmes will be awarded to members of accounting professional bodies.
We are HRDF certified training provider and our course fee is claimable under HRDF's SBL scheme.

Tax planning for individuals / sole proprietors and investors

The main objective of this course is deploying simple tax planning techniques to avoid costly mistakes in tax compliance. If your tax affairs are not unusually complicated, you should be able to plan ahead without any assistance from tax consultants. This course gives valuable advice and guidance on how to make the most of the available tax deductions, exemptions and incentives. The course also covers real property gain tax planning, which has become more complicated with constant changes in the previous years.

LEARNING OUTCOME

By the end of the workshop, you will be able to:

- Differentiate between various legal entity and the associated tax computation.
- Distinguish between tax planning, avoidance and evasion.
- Compare and contrast the difference between personal tax and business tax.
- Identify the key tax planning techniques that are permissible within the law.

METHODOLOGY

Challenging case studies, tax computation preparation, group discussion and Powerpoint presentation.

WHO SHOULD ATTEND

- Accountants
- Finance managers
- Financial controllers
- Individual tax payers
- Academics
- Various investors
- Sole proprietors
- Financial planners

FACILITATOR

TEY SAY YONG OLIVER

B.ACC (SG), MBA (AU), FCCA (UK), AFA (USA), CA (MY), CTIM (MY) CFP (USA)

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, HRDF claimable trainings and ACCA certification course.

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). He is also a certified financial planner (CFP).

Tax planning for individuals / sole proprietors and investors

COURSE OUTLINE

Tax planning for individual

SESSION 1

About self-assessment

Tax planning for everyone

Married tax payers

Tax planning for people in employment

Tax planning for people with property

Tax planning for estates and trusts

SESSION 2

What is income tax for sole proprietor

Commencement of business

Gross income

Tax deductibles or not

Special situations

Allowances for purchase of fixed assets

Managing unabsorbed capital allowances and tax losses

Working out tax payable

Handling tax payment and compliance

Tax incentives

Withholding tax

Making important decisions

GST

Tax planning for investors

SESSION 3

Tax planning for investors

Risk and reward

Tax and tax payer

Self-assessment system

Income or capital gains

Investment vehicles

Dividends

Deposits and loans

Unit trusts and REITS

Structured investment products

Life and other personal insurance polices

SESSION 4

Gold, paintings and antiques

Intellectual property

Commodities

Land and real property

Foreign currencies

Annuities

Investor taxed as trader

Income from trust and estates

Tax deductions for interest

Tax-break investments

Oversea investment

Malaysian tax resident versus foreign investors

Online investor

Stamp duty

Real property gains tax

REGISTRATION FORM

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

Course title	Tax planning for individuals / sole proprietors and investors
Course date	29 March 2018 (Thursday)
Venue	Renaissance Hotel, 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
CPD Hours	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

Do you want the invoice/ receipt to be issued under the company's name? ☐ Yes ☐ No