Financial Planning Symposium 2017

Global Experiences in Financial Planning & Advice

Friday, 21 April 2017 | 8.30AM to 5.30PM
Securities Commission, Kuala Lumpur

Introduction

This Symposium is a gathering of key players and practitioners in the global financial planning profession.

There will be 5 interesting panels covering relevant and important topics in financial planning.

The moderators and panellists are carefully selected to share their vast experience, knowledge, and opinions on the profession.

This will give a good insight to practitioners who wants to enhance and escalate their practice.

Panel Topics

PANEL	TOPIC
1	Building a Profession in a Product Regulation Environment: The Global View
2	The Future Financial Planning Practice – Big Firm, Independent Practice or Both?
3	Fintech and the Future of Financial Planning – Financial Planners & Robo Advisors
4	Islamic Financial Planning & Wealth Management – Importance & Relevance today
5	Running a Family Office – The Inside Story

Target Participants

- Practising Financial Planners
- Financial Advisor Representatives
- Insurance / Takaful Advisers
- Regulators
- Academicians and Educators
- Other Financial Professionals

The Financial Planning Symposium 2017 is sponsored by:

FA ADVISORY

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Price

Types	Price per pax (RM) *(inclusive of 6% GST)*	
	FPAM Member	Non- FPAM Member
Group Rate (minimum 3 pax)	300	318
Early Bird (Register by 3rd April 2017)	318	350
Normal	350	400

Cancellation Refund Policy : Fees are not refundable. Replacement of delegate(s) is acceptable before 10th April 2017.

Registration is confirmed only upon receipt of proof of payment

FPAM Members will receive 10 CE / 7 CPD Points

FPSB India Members will receive 10 CEP

You may register your seat online via the "Log In" button at http://www.fpam.org.my.

If you would like to enjoy the Group Rate, please complete the attached Registration Form and email it to FPAM.

For further enquiries, please email FPAM at events@fpam.org.my or call Ms Tan at 03-7954 9500.

The Financial Planning Symposium 2017 is brought to you by: FPAM CFP ISLAMIC Financial Planner

Revolving Programme

Time	Agenda	
7.50AM	**Registration & Light Refreshment**	
8.50AM	**Opening Address:** Mr Ismitz Matthew de Alwis, *President, Financial Planning Association of Malaysia (FPAM)*	
8.55AM	**Keynote Address:** Tan Sri Dato' Seri Ranjit Ajit Singh, *Chairman, Securities Commission Malaysia TBA*	
9.05AM	**Global Address:** Pamela Packard, *Chairperson, Financial Planning Standards Board* (*FPSB)*	
9.15AM	**PANEL 1 : Building a Profession in a Product Regulation Environment: The Global View**	
	Moderator: Rajen Devadason, *Licensed Financial Planner, Manulife Asset Management; CEO, RD WealthCreation Sdn Bhd*	**Panelists:** 1. European View: Paul Grimes, *CEO, FPSB Ireland* 2. Canadian Story: Dawn Hawley, *Chairperson, Financial Planning Standards Council (FPSC)* 3. South Africa Story, the FPSB regulatory engagement strategy: Gerhardt Meyer, *Board member FPSB*
10.30AM	**Tea Break**	
11.00AM	**PANEL 2 : The Future Financial Planning Practice – Big Firm, Independent Practice or Both?**	
	Moderator: Mark O'Dell, *Group CEO, Manulife Holdings Bhd*	**Panelists:** 1. Barry Horner, *CEO, Paradigm Norton* 2. Neil Kendall, *Managing Director, Tupicoffs* 3. Nancy Kistner, *Managing Director, Bank of America Private Wealth Management*
12.15PM	**PANEL 3 : Fintech and the Future of Financial Planning – Financial Planners & Robo Advisors**	
	Moderator: Dinesh Virik, *Managing Director, Novagni Analytics & Advisory*	**Panelists:** 1. Dante de Gori, *CEO, Financial Planning Association of Australia* 2. Godfrey Nti, *CEO, Financial Planning Institute of South Africa* 3. Ulf Mannhardt, *Director, PLANEJAR - Associação Brasileira de Planejadores Financeiros*
1.30PM	**Lunch**	
2.30PM	**PANEL 4 : Islamic Financial Planning & Wealth Management – Importance & Relevance today**	
	Moderator: Puan Sharifatul Hanizah, *CEO, Securities Industry Development Corporation (SIDC)*	**Panelists:** 1. Sani Hamid, *Director, Financial Alliance Pte Ltd* 2. Tri Djoko Santoso, *Chairman, FPSB Indonesia* 3. Catherine Khoo, *Licensed Financial Planner, CWA*
3.45PM	**Tea Break**	
4.00PM	**PANEL 5 : Running a Family Office – The Inside Story**	
	Moderator: Haji Abdul Aziz Peru, *CEO, as-Salihin Trustees*	**Panelists:** 1. Mari Emmanouilides, *CEO, Taler Group* 2. Dr Mohar Yusof, *Head of Family Office & Islamic Financial Planning Unit, Blurprint Planning*

Disclaimer: FPAM reserves the right to change the speaker(s), date(s) and to cancel the programme. We also reserve the right to make alternative arrangements without prior notice should it be necessary to do so.

Speakers' Profile

Mari Emmanouilides, CFP
Board Member
Brazil

Mari Emmanouilides, CFP, is the executive director and CEO of Taler Group, an independent multi-family office based in São Paulo, Brazil.

Ms. Emmanouilides is a member of IBCPF and has a bachelor's in law from Mackenzie Presbyterian University (Brazil). She sits on the FPSB Board of Directors.

Dawn Hawley, CFP
Chair, Financial Planning Standards Council (FPSC)
Canada

Dawn Hawley is a salaried financial planner with the Angus Watt Group-National Bank Financial in Edmonton, Alberta.

She has more than 35 years of experience in the legal and financial services industry. Her current volunteer roles include FPSC, executive member of STEP Edmonton, member of the Estate Planning Council.

Tri Djoko Santoso, CFP
Chairman, FPSB Indonesia
Indonesia

Tri Djoko, CFP, is an independent commissary of PT Takaful Keluarga, a Shariah compliance life insurance company in Indonesia and the principal of LN Consulting, a financial advisor firm specializing in estate planning in Jakarta.

He has 30 years of sales and marketing experience, serving multinational companies in Indonesia, ie IBM Indonesia, and Prudential Indonesia.

Barry Horner, CFP
Board Member
United Kingdom

Barry Horner, CFP, is the chief executive for Paradigm Norton and is included in the top 20 of 'The Most Influential Financial Advisers in the UK'.

Together with the 46-strong Paradigm team, he has built one of the foremost respected and multi-award winning UK financial planning practices.

Gerhardt Meyer, CFP
Board Member
South Africa

Gerhardt Meyer is the legal executive for the Personal Finance division of Old Mutual South Africa. He is responsible for a national team of legal advisors, based across South Africa.

Mr. Meyer currently serves on and chairs the Regulations Advisory Panel to the FPSB, and his term on the FPSB Board of Directors ends on 31 March 2020.

Neil Kendall, CFP
Chairman, FPA of Australia
Australia

Neil Kendall is the managing director of Tupicoffs, an independent financial planning practice. Mr. Kendall has more than 14 years experience advising high net worth clients and wealthy families. He was the Australian Financial Planner of the Year in 2006 and runner-up in 2009.

Mr. Kendall was elected to the board of the Financial Planning Association (FPA) five years ago and is chairman of the FPA Board.

Nancy Kistner, CFP
Board Member
United States

Nancy A. Kistner is a managing director and wealth planning solutions market director at U.S. Trust, Bank of America Private Wealth Management.

She currently serves as the chair of the CFP Board's Women's Inititative and on the board of The Coalition for Debtor Education which is based at Fordham Law School. Her term on the FPSB Board of Directors ends on 31 March 2019.

Dante De Gori, CFP
CEO, FPA of Australia
Australia

Dante De Gori is the CEO of the Financial Planning Association (FPA) and is passionate about advancing the financial planning profession, supporting FPA members through change and building widespread consumer trust.

He holds a Bachelor of Commerce (majoring in Finance), a Graduate Certificate in Politics and Policy, a Diploma in Financial Planning, and is currently completing a Masters in Government and Commercial Law.

Speakers' Profile

Sani Hamid, CFP
Director, Financial Alliance Pte Ltd
Singapore

Sani Hamid heads the Financial Alliance Islamic Wealth Advisory (FAiWA) division within Financial Alliance.

He has more than 20 years of working experience, having worked for companies such as BNP Peregrine Securities and Standard & Poor's. He appears regularly on CNBC and Channel News Asia.

Godfrey Nti, CFP
CEO, Financial Planning Institute of South Africa
South Africa

Godfrey Nti joined the Financial Planning Institute of Southern Africa (FPI) in 2005 as financial manager. He was promoted to COO in 2008 and later as CEO.

Before joining FPI, Mr. Nti was the financial director of De Montfort University South Africa for 4 years. He is also a member of CIMA.

Catherine Khoo, CFP, IFP
Licensed Financial Planner, CWA
Malaysia

Catherine Khoo is a CWA Certified Financial Planner and a licensed Capital Market Services Representative of CIMB-Prinicpal Asset Management Berhad.

She has over 10 years of experience in the financial services industry as an insurance agent, unit trust consultant and professional estate planner including Islamic estate planning.

She has been actively writing financial articles for Personal Money and a Mandarin weekly Magazine.

Dr Mohar Yusof, CFP
Head of Family Office & Islamic Financial Planning Unit at Blurprint Planning
Malaysia

Dr Mohar has over 20 years of entrepreneurial and managerial experience gained in start-ups and growing businesses coupled with scholarly and professional work in the fields of family business, entrepreneurship, business strategy, family office solutions and financial planning.

He is also the second generation of a family business and advising family-run firms in areas related to their ownership, business and family dimensions.

Ulf Mannhardt, CFP
Director, PLANEJAR - Associação Brasileira de Planejadores Financeiros
Brasil

Ulf Mannhardt has over 35 years of professional experience within the Brazilian, German and international financial markets. He is currently an independent specialist in transnational financial planning and structuring.

In 2000, he was a cofounder of PLANEJAR - Associação Brasileira de Planejadores Financeiros, which was formerly known as *Instituto Brasileiro de Certificação de Profissionais Financeiros (IBCPF)*, the Brazilian Institute for Certification of Financial Professionals, and served as director and president from 2010 to 2013. He now serves as international liaison.

Paul Grimes, CFP
CEO, FPSB Ireland
Ireland

Paul Grimes is the principal of Grimes International and CEO of Financial Planning Standards Board Ireland Ltd. In his more than 25 years of experience in the financial services arena, he has worked with institutions and clients in Australia, Europe, the Middle East, Africa, Asia and the U.S.

He lectures in financial planning and has been featured in a number of professional publications. He is the current chairperson of FPS's European Forum.

Moderators' Profile

Rajen Devadason, CFP
Licenced Financial Planner, Manulife Asset Management
Malaysia

Rajen is a professional speaker, with corporate clients for seminar and workshops included, among others, Bank Negara Malaysia's AKPK, British American Tobacco, Citibank, and others. With his prior experience as a journalist, he has published numerous books.

Sharifatul Hanizah, CFP
CEO, Securities Industry Development Corporation (SIDC)

Puan Sharifatul Hanizah has almost 30 years of experience in the financial services industry. She is a Fellow of the Financial Services Institute of Australasia and a CFP certificant.

Prior to her appointment as CEO of SIDC in August 2016, her most recent role was as the CEO of Muamalat Invest Sdn Bhd (MISB) where she successfully led an impressive twenty-fold increase in AUM from RM120 million to RM3 billion during her four-year tenure.

She was also the immediate past President of FPAM.

Dinesh Virik, CFP
Managing Director, Novagni Analytics & Advisory
Malaysia

Dinesh's career commenced in Normandy over 17 years ago where he gained experience in corporate finance. In 2004, he moved to the development of Normandy's wealth management business.

Dinesh currently spearheads the establishment of Novagni's investment advisory and consultancy business. He is also a CMSRL holder in Investment Advice.

Haji Abdul Aziz Peru Mohamed
CEO, as-Salihin Trustee Bhd
Malaysia

Aziz Peru was Ambank Group's Former Senior General Manager. Prior to this, he held various roles of responsibilities in his almost 30 years with Maybank. During his years in the industry, he was appointed Chairman of the Rules Committee of the Association of Banks of Malaysia.

He is an Independent Non-Executive Director of a few subsidiaries within the RHB Group, including the latest RHB Islamic International Asset Management Berhad.

Mark O'Dell
Group CEO/ Executive Director, Manulife Holdings Bhd
Malaysia

Mark O'Dell was appointed to the Board on 18 January 2013. He holds both the Chartered Life Underwriter (CLU) and the Chartered Financial Consultant (ChFC) designations from the American College, USA.

Mr. O'Dell has over 35 years of experience in the life insurance business including 20 years in Asia across multiple geographies namely Singapore, Indonesia and Malaysia.

REGISTRATION FORM

**To be eligible for Group Rate, each delegate in the group must complete the Registration Form and make a bundle submission*

Name (Dr / Mr / Mrs / Ms / Mdm): As per NRIC / Passport

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NRIC / Passport No.: ____________________ **FPAM Membership No.:** ________________

Email address: ____

(valid email address is needed for confirmation of registration)

Mobile No.: ________________________ **Telephone No.:** ____________________

Company Name: ____

Address:____

____

Designation: ____

PRICE (Please ✓ whichever applicable)

✓	ITEM	Price per pax (RM) (inclusive of 6% GST)
	Member Early Bird (by 3rd April 2017)	318
	Member Normal Rate	350
	Non-member Early Bird (by 3rd April 2017)	350
	Non-member Normal Rate	400
	Group Member Rate (Minimum 3 pax) *	300
	Group Non-member Rate (Minimum 3 pax) *	318

MODE OF PAYMENT (Please ✓ whichever applicable)

☐ **CASH / ONLINE / ATM TRANSFER**

Please bank into **FPAM's Alliance Bank A/C 1210 9001 0005 395** and email or fax a copy of payment receipt / bank-in slip to us

☐ **CHEQUE**

Please issue the cheque payable to **Financial Planning Association of Malaysia**.

Address: Unit 305, Block A, Phileo Damansara I, Jalan 16/11, off Jalan Damansara, 46350 Petaling Jaya, Selangor.

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Early Bird Special – By 3rd April 2017

EMAIL: events@fpam.org.my OR **FAX:** +603 7954 9400

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