

# Course Outline

(A SIDC CPE approved course)

**Title :** Wealth Management and Leadership: Enhancing the Lessons of Experience

**Date :** 5th October 2017

**Venue :** Moffett Training Centre, E-3-2 , Plaza Kelana Jaya, Jalan SS7/13 A, Kelana Jaya, 47301, Petaling Jaya, KL

**CPE :** 10 Points

**Speaker :** Dr Ch'ng Huck Khoon

## Objectives

1. Discuss the future trend of wealth management and get ready for the changes
2. Recognise the importance of leadership in wealth management
3. Discuss the global and local economic outlook
4. State the compliance requirements on AMLA by Bank Negara Malaysia and Securities Commission

Time	Descriptions
9 : 00 - 10 : 15	<b>The Future Trend of Wealth Management</b> <ul style="list-style-type: none"><li>- Total Life Planning</li><li>- Winner Takes All World</li><li>- Wealth Management and Change</li></ul>
10 : 15 - 10 : 30	<b>Coffee Break</b>
10 : 45 - 11 : 30	<b>Leadership Is a Process, Not a Position</b> <ul style="list-style-type: none"><li>- What do we mean by Leadership?</li><li>- Leader Development</li></ul>
101.30 - 13 : 00	<b>Focus on the Leader</b> <ul style="list-style-type: none"><li>- Power and Influence</li><li>- Leadership, Ethics and Values</li><li>- Leadership Attributes</li><li>- Leadership Behaviour</li></ul>
13 : 00 - 14 : 00	<b>Lunch Break</b>
14 : 00 - 15 : 15	<b>Smart Investment Strategies in Current Economic Climate</b> <ul style="list-style-type: none"><li>- Global and Local Economic Outlook</li><li>- Bull and Bear Market Strategies</li></ul>
15 : 15 - 15 : 30	<b>Coffee Break</b>
15 : 30 - 17 : 00	<b>Regulatory Issues in Wealth Management</b> <ul style="list-style-type: none"><li>- Anti-Money Laundering, Anti-Terrorism Financing and Proceeds of Unlawful Activities Act 2001</li><li>- Know Your Clients (KYC)</li><li>- The Insider Trading Prohibitions</li></ul>

# TRAINING COURSE REGISTRATION FORM

COURSE TITLE	Wealth Management and Leadership: Enhancing the Lessons of Experience
COURSE DATE	5th October 2017
VENUE	Moffett Training Centre, E-3-2 , Plaza Kelana Jaya, Jalan SS7/13 A, Kelana Jaya, 47301, Petaling Jaya, KL
REGISTRATION TIME	8.30AM - 9.00AM
TIME	9.00AM - 5.30PM
FEES	<p><b>RM 348 for Banker, member of professional associations [early bird by 5 Sept. 2017]</b>            RM 398 for Banker, member of professional associations  <b>RM 438 for Public [early bird by 5 Sept. 2017]</b>            RM 498 for Public</p> <p><b>Fees are inclusive of coffee breaks, lunch, program materials and a Certificate of Attendance</b>  <i>Fees are inclusive of coffee breaks, lunch, program materials and a Certificate of Attendance</i></p>
SIDC CPE Points	<b>10 (Ten)</b>
Instructions	Complete this form and fax to 03-76104234 or email to cpeseminar@chkconsultancy.com.my
Payment Details	<ol style="list-style-type: none"> <li>Cheque made payable to "CHK CONSULTANCY SDN BHD".</li> <li>Or bank in to MAYBANK A/C #. 557063320872</li> <li>Scan and email bank in slip to cpeseminar@chkconsultancy.com.my or fax to 03-76104234</li> </ol>
Terms & Policies	<ol style="list-style-type: none"> <li>submission of this document would imply agreement to our terms and policies.</li> <li>CHK Consultancy Sdn Bhd only recognizes either payment or Letter of Undertaking and this form to confirm reservation for the participant.</li> <li>CHK Consultancy Sdn Bhd implements a non-refund policy. Transfer to another program date incurs a 20% transfer fee and must be within 1 month from the effected month. However, we allow a replacement participant with no additional charge.</li> <li>Cancellation made within 7 calendar days before the event date will incur a fee of 50% of the program fee.</li> <li>Payment made any time AFTER the program date will result in an additional collection fee amounting to 15% of the original invoiced amount.</li> <li>Registration is on a first-come-first-served basic. Walk-in participant/s will be admitted on the basic of space availability.</li> <li>DISCLAIMER : CHK Consultancy Sdn Bhd reserves the right to change the venue, alter the speaker(s) without further notice, reserves the right to cancel/postpone this program. Administrators and participants will be notified and any payment received will be carried forward.</li> </ol>

## MODE OF PAYMENT

PLEASE TICK

1. By cash, please bank into MAYBANK, "CHK CONSULTANCY SDN BHD"	<input type="checkbox"/>
2. Cheque made payable to CHK CONSULTANCY SDN BHD	<input type="checkbox"/>

## PARTICIPANT DETAILS (COMPLETE ALL DETAILS)

FULL NAME	
DESIGNATION	
NEW NRIC/PASSPORT NO.	
EMAIL ADDRESS	
PHONE NO.	
MOBILE	
SC LICENCE / CMSRL NO.	
PROFESSIONAL ASSOCIATIONS MEMBERSHIP NO.	

## ADMINISTRATOR DETAILS

COMPANY	
CONTACT PERSON	
EMAIL ADDRESS	
PHONE NO.	
FAX NO.	
BUSINESS POSTAL ADDRESS	