

# Course Outline

## (A SIDC CPE approved course)

**Title :** Wealth Management: How to Run Money Like A Pro?

**Date :** 10th April 2020

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

**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. Discuss the latest economic outlooks for Malaysia and Asia Pacific Markets
3. State the compliance requirements on AMLA by Bank Negara Malaysia and Securities Commission

Time	Descriptions
9 : 00 - 10 : 30	<b>Wealth Management and Changes</b> <ul style="list-style-type: none"><li>- The Future Trend of Wealth Management</li><li>- Impact of the Economy</li><li>- Increase Efficiency in Technology</li><li>- Expectation of Quality Service</li></ul>
10 : 30 - 10 : 45	<b>Coffee Break</b>
10 : 45 - 13 : 00	<b>Do the Right Things</b> <ul style="list-style-type: none"><li>- Power of Influence</li><li>- Ethics, Values and Morals</li><li>- Leadership Attributes</li><li>- Building Personal Credibility</li></ul>
13 : 00 - 14 : 00	<b>Lunch Break</b>
14 : 00 - 15 : 30	<b>Smart Investment Strategies in Current Economic Climate</b> <ul style="list-style-type: none"><li>• Latest Economic Outlooks for Malaysia and Asia Pacific Markets</li><li>• GST</li><li>• Sector Analysis</li><li>• Financial Risk Management</li></ul>
15 : 30 - 15 : 45	<b>Coffee Break</b>
15 : 45 - 18 : 30	<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>- Personal Data Protection Act 2010</li><li>- The Insider Trading Prohibitions</li><li>- Market Misconducts</li></ul>

# TRAINING COURSE REGISTRATION FORM

COURSE TITLE	Wealth Management: How to Run Money Like A Pro?
COURSE DATE	10th April 2020
VENUE	Moffett Training Centre, E-3-2 , Plaza Kelana Jaya, Jalan SS7/13 A, Kelana Jaya, 47301, Petaling Jaya
REGISTRATION	8.30AM - 9.00AM
TIME	9.00AM - 5.30PM
FEES	<b>RM 428 for Banker, member of professional associations [early bird by 10 March 2020]</b> RM 478 for Banker, member of professional associations <b>RM 548 for Public [early bird by 10 March 2020]</b> RM 578 for Public <i>Fees are inclusive of coffee breaks, lunch, program materials and a Certificate of Attendance</i>
SIDC CPE Points	<b>10 (Ten)</b>
Instructions	Complete this form and fax to 04-2299327 or email to cpeseminar@chkconsultancy.com.my
Payment Details	1. Cheque made payable to "CHK CONSULTANCY SDN BHD". 2. Or bank in to MAYBANK A/C #. 557063320872 3. Scan and email bank in slip to cpeseminar@chkconsultancy.com.my or fax to 04-2299327
Terms & Policies	1. submission of this document would imply agreement to our terms and policies. 2. CHK Consultancy Sdn Bhd only recognizes either payment or Letter of Undertaking and this form to confirm reservation for the participant. 3. 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. 4. Cancellation made within 7 calendar days before the event date will incur a fee of 50% of the program fee. 5. Payment made any time AFTER the program date will result in an additional collection fee amounting to 15% of the original invoiced amount. 6. Registration is on a first-come-first-served basic. Walk-in participant/s will be admitted on the basic of space availability. 7. 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.

## MODE OF PAYMENT

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| 1. By cash, please bank into MAYBANK, "CHK CONSULTANCY SDN BHD" |  |
| 2. Cheque made payable to CHK CONSULTANCY SDN BHD               |  |

## PARTICIPANT DETAILS (COMPLETE ALL DETAILS)

FULL NAME	
DESIGNATION	
NEW NRIC/PASSPORT NO.	
EMAIL ADDRESS	
PHONE NO.	
MOBILE NO.	
CMSRL LICENSED NO.	
ERP LICENSED NO.	
AICB LICENSED NO.	
FIMM LICENSED NO.	
PROFESSIONAL ASSOCIATIONS MEMBERSHIP NO.	

## ADMINISTRATOR DETAILS

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