

Course Outline

(A SIDC CPE approved course)

Title : Wealth Management and Investment Planning

Date : 20th February 2020

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. List the future trend of wealth management and get ready for the changes;
2. Identify Investment planning as an essential ingredient in the financial planning process
3. Recognise active and passive portfolio management strategies; and
4. Examine the investment psychology that affects investment planning.

Time	Descriptions
9 : 00 - 10 : 00	The Future Trend of Wealth Management <ul style="list-style-type: none">- Total Life Planning- Winner Takes All World- Wealth Management and Change- Fintech, Big Data and Industry 4.0 – Robo Advisor
10 : 00 - 10 : 15	Coffee Break
10 : 15 - 11 : 00	Investment Planning: Why the Need? <ul style="list-style-type: none">- The basic reasons why individual invest- Risk vs. Return- why individual needs an investment plan?
11 : 00 - 13 : 00	The Important of Portfolio Management <ul style="list-style-type: none">-World and Malaysia Economic Outlook- Portfolio Theory- Formulate Passive and Active Portfolio Management Strategies in Current Ecoomic Climate
13 : 00 - 14 : 00	Lunch Break
14 : 00 - 16 : 00	Investment Psychology <ul style="list-style-type: none">- Stock market anomalies- Behavioural finance- Retail investor's investment psychology- Beware of Investment Traps- Understand Your Own Investment Style. Discussion: How to Become a Smart Investor ?
16 : 00 - 16 : 15	Coffee Break
16 : 15 - 18 : 30	The Art of Selling <ul style="list-style-type: none">- The time of selling- The amount to be sold- The type of Stock / investment product to be sold.- Cut loss and stop loss Strategies

TRAINING COURSE REGISTRATION FORM

COURSE TITLE	Wealth Management and Investment Planning
COURSE DATE	20th February 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	RM 428 for Banker, member of professional associations [early bird by 20 Jan 2020] RM 478 for Banker, member of professional associations RM 548 for Public [early bird by 20 Jan 2020] RM 598 for Public <i>Fees are inclusive of coffee breaks, lunch, program materials and a Certificate of Attendance</i>
SIDC CPE Points	10 (Ten)
Instructions	Complete this form and fax to 03-76104234 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
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MODE OF PAYMENT

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AICB LICENSED NO.	
FIMM LICENSED NO.	
PROFESSIONAL ASSOCIATIONS MEMBERSHIP NO.	

ADMINISTRATOR DETAILS

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