Course Outline

(A SIDC CPE approved course)

Title : Wealth Management and Leadership: Enhancing the Lessons of Experience
Date : 8th July 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. 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	**The Future Trend of Wealth Management** - Total Life Planning - Winner Takes All World - Wealth Management and Change
10 : 15 - 10 : 30	**Coffee Break**
10 : 45 - 11 : 30	**Leadership Is a Process, Not a Position** - What do we mean by Leadership? - Leader Development
101.30 - 13 : 00	**Focus on the Leader** - Power and Influence - Leadership, Ethics and Values - Leadership Attributes - Leadership Behaviour
13 : 00 - 14 : 00	**Lunch Break**
14 : 00 - 15 : 15	**Smart Investment Strategies in Current Economic Climate** - Global and Local Economic Outlook - Bull and Bear Market Strategies
15 : 15 - 15 : 30	**Coffee Break**
15 : 30 - 17 : 00	**Regulatory Issues in Wealth Management** - Anti-Money Laundering, Anti-Terrorism Financing and Proceeds of Unlawful Activities Act 2001 - Know Your Clients (KYC) - The Insider Trading Prohibitions