FPAM
FINANCIAL PLANNING ASSOCIATION OF MALAYSIA

Creating Trust Through Written Financial Plans

On 24 July 2010, 2.00 pm to 6.00 pm at The Northam All Suite Hotel , Penang

COURSE OBJECTIVES AND OUTLINE

This half day seminar is timely given the erosion of trust in financial advisors worldwide and the need for advisors to gain experience actually creating and delivering written financial plans. CFP surveys conducted in the USA in 2004 and again in 2009 revealed that individuals who have a written financial plan are more likely to feel satisfied with how they manage their financial affairs, more likely to use a professional planner to create the plan, more likely to rebalance their portfolios and take advantage of market downturns, less likely to be worried about preparing for retirement, and less likely to make financial decisions based solely on their own knowledge.

Learning objectives:

- Develop your unique 5 point "branding message" explaining what you do as a financial advisor.
- The Values Dialog---how to build a strong bond of trust by understanding what matters most to your client.
- The Goals Dialog---how to understand your client's financial goals and build on the trust established through the values dialog.
- Writing and delivering a "Values, Goals, and Questions letter". Failing to provide this letter is one of the biggest failings of financial advisors.
- Creating and Presenting a Net Worth Statement that inspires trust. What do you see when you look at the Net Worth Statement? It's probably not what your clients see.
- Help your clients see the future and commit to a long-term savings and investing program. Putting this exercise first before investing always builds trust.

SPEAKERS' PROFILE

Mr. Brad Greer, CFP,PFS

PlanPlus VP Global Sales & China Operations.

Brad joined PlanPlus (www.planplus.com) in Oct. 2008 and is responsible for Global Sales & China operations. Prior to PlanPlus, Brad worked as Director of Financial Planning for Wells Fargo Bank Private Client Services in San Francisco. Brad was the chief architect of Wells Fargo's Financial Planning Portal, a web based comprehensive financial planning system used by over 4,000 Wells Fargo advisors. In 2007, Brad was selected by the Wells Fargo Foundation and the FPA (USA) to help the Financial Planning Standards Council of China develop Wealth Management training for bankers and to share CFP continuing education best practices.

Ms. Wee Hen Tang, CFP,C.A.(M),CPC

PlanPlus VP South East Asia.

Wee Hen began working with PlanPlus in Oct. 2009. She is responsible for sales, training and operations within South East Asia. She is a partner at Harvest Global Resources Sdn. Bhd.. Wee Hen has more than 6 years experience in Financial Services. She was previously employed as VP, Financial Care Centre at CIMB Wealth Advisors Berhad. Wee Hen set up, managed and developed the Financial Care Centre, a licensed and fee based financial planning centre. Wee Hen is a Certified Financial Planner and a Professional Coach (certified by the International Coaching Federation, USA). She is a board member of the Financial Planning Association of Malaysia (FPAM), and a member of the International Coaching Federation (ICF) Malaysia.