A|D A.D. FINANCIAL
Your financial partner
(Licensed Financial and Investment Advisers)

As an aspiring Financial Planner, are you facing the following challenges?

- Lost client's confidence
- Portfolio crashed in the financial crisis
- Unsure of future strategies/direction
- Unable to compete effectively

Come join us in

Understanding the CORE STRATEGIES in Investment Planning

MFPC-ACCREDITED: 3 CPD POINTS

Date : 4th March 2010 (Thursday)
Time : 10.00am – 1.00pm
Venue : A.D. FINANCIAL SDN. BHD.
Suite 716, Level 7, Block E, Phileo Damansara 1,
Jalan 16/11, 46350 Petaling Jaya, Selangor.

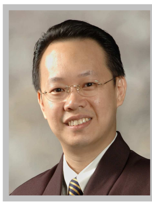
Introduction

The continuing growth and liberalization of the retail investment industry has presented investors with multitude of choices. Investors are now more mature, knowledgeable and demands professional quality advice. Whilst Financial Planners has been trained on investment planning processes, diversification, asset allocation and modern portfolio theory; its implementation and real-world practice is filled with complexities due to the overwhelming variety of investment instruments and economic environment. In this short course, A.D. FINANCIAL, an independent Licensed Investment and Financial Adviser firm by Securities Commission and Bank Negara Malaysia, shares their experience in overcoming these challenges in striving towards effective, professional and independent investment planning.

Outlines

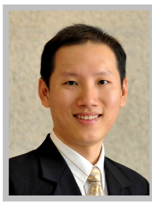
1) Investment Planning before Financial Planning or Financial Planning before Investment Planning? How to do it effectively?
2) Charging a fee for various scenarios in Investment Planning.
3) How to choose the right fund for your clients? Effective fund research, due diligence and building an optimized portfolio.
4) Are you adding value as a Financial Planner? Modeling, back testing, benchmarking & real-time analysis.

Speakers' Profile :



Alvin Yap
B. Eng M.ScFP(NZ) ChLP FChFP RFP

Alvin Yap is the Managing Director and Chief Executive Officer of A.D. FINANCIAL SDN BHD an independent Licensed Investment and Financial Adviser firm by Securities Commission and Bank Negara Malaysia. He has devoted his practice to Estate Planning for High Complex Wealth Individual, structuring their complex wealth matters through the elements of Preservation first, Accumulation second and lastly Distributing their hard earned wealth for Generational Wealth Strategy.



Bryan Zeng
Bac. Comp Science CFP

Bryan Zeng is the Senior Executive-Business Development of A.D. FINANCIAL SDN BHD an independent Licensed Investment and Financial Adviser firm by Securities Commission and Bank Negara Malaysia. He is a CFP professional, and has more than 7 years in the Unit Trust industry. His passion is in delivering value through superior investment planning.

For enquiries, kindly call Nurul 03-7956 8833 or email info@adfinancial.com.my

Registration Form – Understanding the CORE STRATEGIES in Investment Planning

SEMINAR FEE

RM 45

PARTICIPANT DETAILS

Name (Mr/Ms/Mrs/Dr)	
NRIC No	Designation : RFP/CFP/ChFC/ Others:_______________
Office	
Mobile	Fax
Company	Email
Address	

PAYMENT OPTIONS

❑ Pay by Cheque No: ______________________ RM ________
Please post your crossed cheque payable to **A.D. FINANCIAL SDN BHD**

❑ Pay by Credit Card: RM ________
Please charge to my ❑ Master ❑ Visa

Card No

CVV2 No. (last 3 digit no. at the back of card)

Name of Cardholder:
(as appeared in the card)

Signature: Expiry Date:

You may fax this registration form to 03-7957 3833