

Who We Are...

A.D. FINANCIAL SDN BHD is a licensed Financial Planning firm specializing in Estate Planning Advisory. A licensed company with Securities Commission and Bank Negara of Malaysia, we have developed the complete Asset Preservation, Accumulation and Distribution preparedness system that is helping thousands of individuals and families discover the freedom and peace of mind in handling their complex wealth by achieving their objectives and goals.

Our Purpose...

Our purpose is to empower people with the skills to wisely manage their assets and accomplish their personal, families and community goals. A.D. FINANCIAL services, products and center support plays an integral role in helping our client protect their hard earned wealth during the lifetime and after death making sure that their wealth will not go into the wrong hands due to any unforeseen circumstances. This can only be achieved by planning ahead.

Our mission...

We seek to accumulate and strengthen your wealth thru element of Preservation, Accumulation and Distribution Planning by helping our clients to formulate a strategy to better hold and manage their assets. As the nation's leader in providing Estate Planning, we will always provide our clients with impartial advice and unequal personal service

REGISTRATION

Confirmation

To confirm your registration, please complete the Estate Planner Practice (EPP) Training "Application Form" and fax it back to us

Important Notice

Payment is required with registration and must be received prior to the event to guarantee your seat. Walk in Delegates with payment will only be admitted subject to availability of space.

Cancellation and Postponement

Should you be unable and would like to postpone your attendance, kindly inform us no later than 3 days from the date of event. No refund will be given for cancellation. You are allowed to transfer or to provide a substitute delegate and inform us no later than 3 days.

A.D. FINANCIAL reserves the right to cancel the event or make any amendments and/or changes to the program if warranted by circumstances beyond its control

For further enquiries, please call...

A.D. FINANCIAL SDN BHD (603062-M)
(Licensed Financial Planner CMSL/A0186/2007)
Unit 716, 7th Floor, Block E, Phileo Damansara 1, Jalan 16/11
46350 Petaling Jaya Selangor Darul Ehsan
Tel: 603-7956 8833 Fax: 603-7957 3833
Email: info@adcapital.com.my
Website: www.adcapital.com.my



Accredited by
MALAYSIAN FINANCIAL PLANNING COUNCIL – 15 CPD hours
SIDC CPE – ACCREDITED = 10 CPE points

Building an Estate Planning Advisory Practice within Financial Planning (Estate Planner Practice)

Who should participate?

- **RFP, CFP, FChFP ChFC Holders**
- **Future Financial Practitioners**
- **Life Insurance Practitioners**
- **Will Writers**
- **Trust Officers**
- **Legal Advisers**
- **Licensed Representatives with Securities Commission**
- **Other Financial Industry Professionals**

Building Professional Estate Planners

ORGANIZED BY:



ENDORSED BY:



Background

The complexities of Malaysians wealth today have given rise to the need of planning for their estate. Maximizing and preserving their hard earned wealth by avoiding legal hassles and family disputes over the asset left behind by them is indeed a big question mark. Product alone such as Wills is not a sufficient means of transferring and distributing their wealth. The formation of an Estate Planner Practice platform shall provide additional avenues in dealing with such complexities.

The duty of an Estate Planner having wearing the “Planning Cap” (instead of “Product Cap”) has the duty and responsibility in keeping the client informed and providing lifelong impartial guidance in all areas of Estate Planning. The planner should be aware that Estate Planning is part and parcel of the total Personal Financial Planning process.

Objectives

These 6 types of training are structured to raise awareness of the importance of Estate Planning and its potential applications as a tool of Wealth Management to all Financial Practitioners.

The training material led by practitioners who are also the trainers of this course which will enable participants to acquire the competency of estate planning to their clients. The focus of this course is more towards the practical deliverables in their practice as Financial Practitioners. Participants like the insurance practitioners, trust officers, legal advisers and will writers form the best combination for such practices where their current expertise is further developed to provide holistic solutions to the complexities of their clients’ wealth.

Training Outline*

Essential Estate Planning Practice – The Intricacies (1 day)

To ‘Trust or not to ‘Trust’ in Estate Planning (1 day)

To ‘Will’ or not to ‘Will’ in Estate Planning (1 day)

Managing Individual’s Risk in Estate Planning (1 day)

Islamic Estate Planning (1 day)

The Intricacies of Business Succession Planning (1 day)

** Please refer to each course outline details on the separate sheet attached*

Program

09.00 – 09.30am	Registration
09.30 – 11.00am	Session I
11.00 – 11.15am	Tea Break
11.15 – 12.30pm	Session II
12.30 – 1.00pm	Question & Answer Session
01.00 – 2.00pm	Lunch Break
02.00 – 03.30pm	Session III
03.30 – 03.45pm	Tea Break
03.45 – 05.00pm	Session IV
05.00 – 05.30pm	Question & Answer Session

Key Features

- Learn the important aspects of essential practice of Estate Planning as an Estate Planner
- Know the major areas of Estate Planning intricacies by recognizing each and every component that are vital for planning
- Ability to mind map the Estate Planning needs of your clients
- Ability to identify the right execution of Estate Planning tools
- Provide quality and professional advice confidently and competently as an Estate Planner



ENQUIRIES & REGISTRATION

Register Now! Fax the completed Estate Planner Practice “Application Form” directly to 03-7957 3833 or email to info@adfinancial.com.my

For further enquiries, please contact Bryan / Azlin at 03-7956 8833