

Kick- Start Your Financial Planning Practice



Financial Planning



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WONDERING HOW TO KICK-START?

Join our fortnightly PlanPlus Planit Web Cast Series to kick-start your practice

As a strategic partner to Phillip Capital and FAME, PlanPlus has specially designed a series of PlanPlus Planit fundamental trainings to help you to transition your financial planning practice .

No	Topic	Date & Time
1	Introduction to PlanPlus Planit - Learn how to Navigate PlanPlus Planit's many functions and features so you can efficiently produce client documents, PDF's and reports. Learn how different level of planning to cater for different level of clients' planning needs – Investment Portfolio Management, Life goals Planning, Insurance Planning etc.	June 26 3pm – 4pm
2	Introduction of Investment Policy Statement – learn how to structure investment portfolio based on client's risk profile, Asset Allocation and model portfolio. This covers the suitability assessment, investment portfolio optimization.	July 10 9.30 –10.30 am
3	Introduction of Life planning - learn how you can add value to your clients via life goals planning process	July 24 9.30 -10.30 am
4	Introduction of “Retirement Goal Planning” – learn how to use retirement goals needs calculator to engage with client on modular planning and show client what alternative strategies they can hev to achieve their Retirement Goal Planning	July 31 9.30 – 10.30am

Upon registration, you will be provided the web cast login details. For further enquires, please email to azie.ishak@planplus.com

Wee Hen has more than 10 years experience in the financial planning services. She is a Chartered Accountant, CFP and ACC(Associate Certified Coach) credentialed by ICF USA. She coaches aspiring financial planners and advisors to transition from multi-product seller to become true to label financial planners/advisors. Currently she is a board member of FPAM Board of Governors, leading the Practitioners Development Work Group and also a member of FPA Global Committee.

