



Will Writing Workshop

“A FINANCIAL PLAN IS NOT COMPLETE WITHOUT A WILL”

RM 480 (per pax)

Date : 24th – 25th April 2007 (1 ½ days)
Time : 10.00am – 5.00pm (5th), 10.00am – 1.00pm (6th)
Venue : Money Concepts Malaysia, Desa Sri Hartamas



Inclusive of:-

FREE! One year subscription to MyWill Software (Will Writing software worth RM350.00*)

FREE! Three (3) months legal advice on Will Writing**

GROUP BONUS (3+1 Free)! Attend for Free with every 3 successful sign-up participants referred by you.***

Traning Material included

Discover how to use Will-Writing Service to increase your profit in this seminar! In this seminar, you will learn:

- ✓ **Introduction to Estate Planning**
- ✓ **Practical and legal aspects of Will-Writing**
- ✓ **How to create value-added services to clients**
- ✓ **10 Golden Rules of Will-Writing**
- ✓ **Step by Step guide on how to use MyWill software to write Wills in a short time frame**
- ✓ **Case studies**



"If you avoid Will-Writing as a value added service, you might as well push your clients into the arms of other agents." –Money Marketing Magazine, UK

COURSE OUTLINE

Introduction to Estate Planning

- Concept of Estate Planning
- The 3 P concept in estate planning

Legal Aspect of Wills

- What is a Will?
- Death Overview
- Distribution Act
- Recipe to prepare a Will
- Testator's/Testatrix's requirement
- Format/Contents of a Will
- How to revoke a Will
- Inheritance (Family Provision) Act 1971
- Properties that cannot be dealt with under a Will
- Jurisdiction of the courts
- Foreign Assets

Practical Aspect of Will Writing

- Business of Will Writing
- How to draw up Wills for Clients
- 10 golden rules for Will Writing
- Operational Procedures
- How to use the Instruction Taker Form

Custodians of Wills

- Custody of Wills
- Trustee Services
- Q & A.

* Renewable yearly at RM200.00 ** Not inclusive of drafting of custom Will clauses. *** free seat are not exchangeable for cash.

The Trainer

Mr Ken Lo

Managing Director cum CEO of Money Concepts Malaysia Sdn Bhd and Quality Credentials Sdn Bhd.

Money Concepts Malaysia is an independent Financial Advisor where our core business include Turnkey financial planning center for banks, personal financial planning Business Succession Planning Inheritance Planning and Portfolio Investment Advisory Services

Mr. Lo has over 10 years of vast experience as financial adviser to businessmen, investors and individuals of high net worth. His corporate clients come from all kinds of industries such as manufacturing, consumer products distributing, property developing, real estate brokering, legal firms, fund managing firms and etc. Mr. Lo is also a familiar face in the training, lecturing and conventions circuit in Malaysia. He has graced the platforms in the Unit Trust Companies, Banks and CFP courses, to name a few.

Mr. Lo holds numerous qualifications, the B. Eng (Hon) UK, International Certificate for Financial Adviser (ICFA) and Certified Financial Planner (CFP). He is the author of the book entitled "Estate Planning Process and Practices".

He is now a member of the Board of Governors of FPAM, Chairman Of Practice Standard Review Committee and former President of Rotary Club Of Tanjung Aru, Kota Kinabalu (1992/1993). He was the founder and Managing Director of the first Will Writing company in Malaysia. Mr. Lo is formerly a Senior Agency Manager of an International Insurance Company in Malaysia.

He had been invited to share his experiences as a guest speaker at the Chartered Financial Consultant Convention, National Association Malaysia Life Insurance Agent & Financial Adviser (NAMLIFA) and MY FM Radio talk show. He is one of the 3 speakers of the First Forum held in 2004 to speak on the title: "Building Your CFP Practice in Malaysia – Hurdles and Opportunities" and also a speaker for MIA(Malaysian Institute of Accountant) for "The Direction of Financial Planning in Malaysia & Globally" Seminar recently in Malaysia. Mr. Lo has graced the platform of The 8th Asia Pacific Financial Planning Conference 2006 on Practice Standards in Financial Planning in Singapore recently.

Organized By:

Quality Credentials Sdn Bhd

10-2, Plaza Crystalville II, Jalan 22A/70A, Desa Sri Hartamas, 50480 Kuala Lumpur, Malaysia.
Tel: 603-6203 2892, 2894 Fax: 603-6203 2825

----- **REGISTRATION FORM** -----
Will-Writing Seminar

Date : 24th - 25th April 2007

Time: 10.00-5.00 p.m (24th), 10.00-1.00pm (25th)

Venue: Money Concepts Malaysia, Desa Sri Hartamas

I am interested, please register me for this training

(Please fax this registration form to 03-6203 2825)

Name : Mr/Mrs/Miss _____

NRIC No.: (New) _____ (Old) _____

Mailing Address: House Office Others (please specify) _____

Full Address : _____

Phone No.: (House) _____ (Office) _____

(H/P) _____ (Fax) _____

E-mail : _____

Company : _____ Occupation: _____

Referral Name (if any) : _____

Amount Payable :

(inclusive of training materials and 1 year subscription to MyWill software)

[] **RM 480.00 per pax**
- for fresh participants

[] **RM 380.00 - *Re-training for past participants with MyWill ver 2 software**
MyWill Ver 2 Serial No. _____

Payment Method :

Bank/Cheque No. _____ (payable to **Quality Credentials Sdn Bhd**)

Ringgit Malaysia _____ (RM _____)

By Post

Direct Bank-in Bank A/c Info: Alliance Bank 14176-0-01-000371-4

Signature : _____ Date : _____

Terms & Conditions

1. **There will No refund for cancellation** but the organizer accept another person to attend in substitute.
2. The organizer also reserved the right to make any changes as deemed necessary. Any Changes would be communicated by either facsimile, email or telephone call.
3. A full refund will be issued should the event be cancelled due to any unforeseen circumstances.

** applies to existing MyWill version 2 user only. Kindly provide your existing MyWill software serial number.*

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