"2 Days Financial Planning Program"
Training Time : 9am to 5pm
[Classroom]
Digital Certificate of attendance awarded for those who complete the course

INTRODUCTION

This comprehensive two-day training program is designed to provide participants with practical knowledge and skills in personal financial planning. The program combines theoretical concepts with hands-on exercises to ensure effective learning.

COURSE OBJECTIVES

A comprehensive financial plan involves understanding key financial concepts, creating effective budgets, and saving for short-term goals and emergencies. It includes making informed investment decisions, planning for retirement and major life events, and managing debt through strategic repayment to ensure long-term stability and growth.

METHODOLOGY

Assessment, Case Study & Discussion.

WHO SHOULD ATTEND?

Financial planning courses are ideal for young professionals, families, retirees, and anyone managing debt or savings. They benefit small business owners, students, and investors aiming for better financial decisions. These courses help build confidence and stability for all life stages.

TRAINING NEEDS

Physical Appearance

COURSE CONTENT

Day 1:

9.00am – 12.30pm:
Module 1: Foundamentals of Financial Planning

- Financial Planning Environment, Phenomenon and Process
- Personal Financial Statements
- Cash Flow Management
- Time Value of Money

12.30pm – 1.30pm:
Lunch

1.30pm – 3.00pm:
Module 2: Risk Management & Insurance Planning

- Understanding Risks & Risk Management
- Insurance Needs Analysis
- Life & Health Insurance Policies

3.00pm – 5.00pm:

Module 3: Investment Planning

- Basic Concepts of Investments
- Financial Statement Analysis
- Types of Investment

Day 2:

9.00am – 12.30am:

Module 4: Zakat & Tax Planning

- Introduction to Malaysian Income Taxation
- Resident status of individuals and other persons
- Computation of Chargeable Income
- Employment & Investment Income
- Zakat for individuals in Malaysia
- Tax Administration & Tax Planning

12.30pm – 1.30pm:

LUNCH

1.30pm – 3.00pm:

Module 5: Estate Planning

- The Concepts and Fundamentals of Estate Planning
- Testacy & Intestacy
- Estate of Muslims
- Trust & Power of Attonery

3pm – 5pm:

Module 6: Retirement Planning

- An Overview of Retirement Issues
- The Retirement Planning Process
- Analyzing Investment Risk and its Application
- Investment Basics and Strategies in Retirement Planning
- Strategy to meet Shortfalls in Retirement Capital

5.00pm – 5.30pm:

Question & Answer, Wrap Up of Two – Day Training Program