

Dear Members,

2012 is coming to an end soon. It is time to have a snapshot of the work done in this final quarter.

### **(A) Financial Planning Day 2012 – Present Practitioner, Future Excellence**

Our annual **Financial Planning Day** seminar was held on **Friday, 28 Sept 2012** at NTUC Auditorium. This year, the seminar was a roaring success, with more than 400 financial practitioners attending the event.

We would like to thank our co-hosts: AFA(S), IFPAS and SFSP for their support and concerted efforts; our generous sponsors: Great Eastern Life, Manulife Singapore Pte Ltd, Professional Investment Advisory Services, and Tokio Marine Life Insurance Singapore; and our goodie bag sponsors: Great Eastern Life, Hong Kong and Shanghai Bank, Obolo, Professional Investment Advisory Services, General Insurance Association, Quotient Travel Planner, and last but not least, Urban Fairways for sponsoring the Lucky Draw finale.

For those who attended the seminar, we hope you found the session useful and encouraging, as the speakers shared their insights, thoughts and experiences. If you were not able to join us this year, please attend FPD 2013 as we anticipate the next gathering will be bigger and better!

### **(B) Certification Board's Breakthrough Initiatives**

I would like to share with you some of the initiatives our Certification Board Committee Members, who have been working diligently for the betterment of the gold mark, CFP®.

- (1) Certification Board Committee Members continue to develop more questions for FPAS' Exam Question Bank.
- (2) We are requested by FPSB to periodically conduct surveys to determine which financial planning competencies, skills and areas of knowledge are thought important, and which ones are actually being used. This is to ensure tighter control and relevancy of exam questions used for the CFP certification examination.
- (3) Cycle 3 2012 Exam Results will be released on 17 December 2012.
- (4) As highlighted previously, we will continue to publish the passing percentages of each module, for each exam cycle, on the website as a move to promote greater transparency.

### **(C) Practitioner Enrichment Programs**

The monthly lunch time talks aim to enhance the knowledge and awareness of our practitioners with the current trends and updates in the market received much support from our members and non-members alike.-

- (1) 14<sup>th</sup> Nov 2012 - "General Introduction to Retail Banking & Wealth Management" by Mr. Victor Bay, Senior Vice President, Business & Relationship Management, Retail Banking & Wealth Management – Premier International at HSBC
- (2) 12<sup>th</sup> December 2012 - "Debt Management to avoid Bankruptcy" by Mr. Leong Sze Hian, Past President at Society of Financial Service Professionals

Please attend these talks as the knowledge gained will greatly benefit you at both your professional and personal front.

**(D) Consumer Outreach Program**

We have shared with over 100 Business Finance students at Republic Polytechnic on "Rich Man, Poor Man" Financial Seminar on 30<sup>th</sup> Oct 2012.

**(E) Editorial Board – Financial Planning Magazine (Nov 2012 issue)**

The Nov 2012 issue of the Financial Planning Magazine was published and distributed in the first week of November. We trust you have enjoyed reading it!

Please feel free to contact the Secretariat should you wish to pick up extra copies for your office or clients.

**(F) Membership Renewal for Year 2013**

The annual membership renewal has commenced in November 2012 and you would receive the renewal notification via emails. Please renew your membership on line or send a check to us.

Merry Christmas and Happy New Year.

Always at your service,

Kimmi Pun, CFP®  
President