

President's Chat – August 2013

Dear Members,

Since our AGM on 22nd March 2013, the new EXCO members have been diligently working towards enhancing member benefits and aligning FPAS with the market changes.

A. Membership - Members' Benefits

1. Web Register for our Licensed Certificants

As part of our ongoing effort to enhance member benefits, we extend the web listing to all active CFP practitioners on compliment (usual annual service fee of \$40) with effective from 1st June 2013.

2. Professional Indemnity exclusive for members

AEGIS Insurance Services is offering an exclusive Professional Indemnity plan of annual aggregate limit of SGD5,000,000 at an affordable rate to our members.

If you have not signed up, please note the soon closing date is on 31st August 2013.

3. Professional Development Course - AEPP® Certification Program

The next class is on the 20th and 21th August 2013. Attendees will be credited with 12 CPD hours upon completion.

4. Members' Event - 4th Financial Planning Day

Date : 4th October 2013 Friday
Time : 8.15am – 12pm
Venue : NTUC Auditorium
Theme : **“Putting Professionalism and the Client at the Heart of Financial Planning”**

FPAS and our 3 esteemed partners, the Association of Financial Advisers (Singapore), The Insurance and Financial Practitioners Association of Singapore and Society of Financial Service Professionals, come together to organize this annual platform of knowledge sharing and reaffirmation of our commitment to professional financial planning and client relationship.

Mr Lim Biow Chuan, MP for Mountbatten; and President of CASE will be our Guest of Honor.

We have invited the following esteemed speakers: -

- a) Mr Stanley Tan
Managing Director and Principal Consultant, Trusted Advisor Asia

Pte Ltd

- b) Mr Eric Feng
Public Speaking Coach, Bestselling Author of *Get To The Point*®

Just log on to our website <http://www.fpas.org.sg> to get the event ticket @ \$75 per pax or the FPAS Advertorial on Straits Times, 04th October 2013 @ \$238.

The closing date for registration for the event is by 30th August. Please register now!

B. Certification Matters

1. New Approved Education Providers

Our 2 Newly Approved Education Providers namely:

- a) KapitalMinds Pte Ltd; and
- b) TMC Academy Pte Ltd

have since commenced with the recruitment of students for the CFP Certification Program for Cycle 3 2013.

C. Practitioner Enrichment Programs

1. Tea time Talks

The next tea time talk will be conducted on 11th September 2013. The topic is “**Structuring an Effective Wealth Transfer**” by Ms Michelle Lau, Senior Director and Head of Wealth Planning – South Asia of HSBC Trustees (Singapore) Ltd.

2. Code Of Ethics Workshops

FPAS has conducted a Code Of Ethics workshop on 17th May 2013 with good participation. Here is the next 3 sessions:

- a) 16th Aug 2013
- b) 18th October 2013
- c) 13th December 2013

D. Consumer Outreach Program

We are actively participating in both radio broadcast and public appearance.

- 1. **12th July 2013**
- Live Interview by FM95.8

Riding on the theme of improving quality of Financial Planners, FPAS was interviewed to promote the importance of qualified financial planners to protect the interest of clients. I and Ms Cindy Siu, CFP® and Public Awareness Board Chairman, put in good effort and gained publicity for FPAS and the most prevalent our CFP mark.

2. **1st August 2013**

- **“Secure your Retirement Income in your Golden Years”** : Financial Planning Talk Series organised by TMC Academy Pte Ltd with FPAS.

Our member, Ms Kee Siew Poh, CFP®, shared her expertise on financial planning with the public at TMC City Campus.

3. **10th September 2013, 9am to 2pm**

- **WealthMatters Singapore 2013 at Raffles Hotel**

We are supporting this event and the organizer has given us 50 free tickets. If you want to get one, please call our Secretariat.

I am invited as a panel speaker sharing views on “Latest Thinking on Client Experience and Reporting”.

For more information, please refer to the below link:

http://www.wealthbriefingasia.com/event_detail.php?id=52941

4. **15th September 2013, 12:30pm to 5:30pm**

- **“Are You Ready?” : HealthCare Bazaar by CPF Board**

- a) Ms Kee Siew Poh, CFP®, will be representing FPAS as the registered speaker to talk on Private Shield Plans
- b) Mr Tommy Chu, CFP® and Mr Joseph Teo, CFP® and Membership Board Chairman, will be representing FPAS to share information on the healthcare to the public.

E. Editorial Board

We have two requests to republish articles from our Financial Planning Magazine – Winds of Change, November 2012 issue.

- 1. Thailand Financial Planning Association (FPSB Thailand)
 - “Financial Advisory Fees and Charges”
written by Mr Sammy Chiu, CFP®

<http://www.fpas.org.sg/download/ThePractice/Financial-Planning-2012Nov.pdf>

- 2. CPF Board
 - “Protect Yourself Against Hefty Medical Bills”
written by Ms Kee Siew Poh, CFP®

<http://www.fpas.org.sg/download/ThePractice/Financial-Planning-2012Nov.pdf>

I will keep the good news coming and welcome your feedback.

Always at your service,

Kimnis Pun, CFP®
President