Presents

CRITICAL FINANCIAL ADVISORY UPDATES:

(1) SPECIAL NEEDS TRUSTS (2) RECENT CPF, HDB AND HEALTHCARE POLICY CHANGES (3) THE MENTAL CAPACITY ACT

Saturday, 14th August 2010, 2.30 pm – 5.00 pm, Function Room, MND Complex, Annexe A, 5 Maxwell Road

About this Seminar:

At this seminar, two leading practitioners will discuss current issues & developments relevant for any involved in the financial advisory or financial planning process or working in the wealth management industry.

1. Special Needs Trust:
   a. Implications on Financial Planning for parents of children with disabilities.
   b. Managing the Decision Making Process
   c. Considerations involved, relevant options and possible alternatives
2. Update On Recent CPF, HDB And Healthcare Policy Changes - Implications For Financial Planning
3. Mental Capacity Act
   a. Overview
   b. The Lasting Power of Attorney
   c. Use of the Lasting Power of Attorney in Estate Planning

Seminar Programme:

2.15-2.30pm	Registrations & Refreshments
2.30-2.35pm	Opening Remarks by Seminar Chairperson: *Mr. Benny Ong – President, Society of Financial Service Professionals*
2.35-3.30pm	Presentation by Mr. Leong Sze Hian on: • Special Needs Trust: • Update On Recent CPF, HDB And Healthcare Policy Changes - Implications For Financial Planning
3.30-3.50pm	Networking Break
3.50-4.30pm	Presentation by Ms. Wendy Wong on the Mental Capacity Act
4.30-5.00pm	Q&A session moderated by Seminar Chairperson
5.00pm	End

About the Speakers

Mr. Leong Sze Hian - Past President, Society of Financial Service Professionals

An alumnus of Harvard University, he has been a Wharton Fellow, authored 4 books, quoted over 1000 times in the media , host of a money radio show and a daily newspaper column, and invited to speak more than 100 times in more than 20 countries on 5 continents. He has served as Honorary Consul of Jamaica, Chairman of the Institute of Administrative Management, the UNESCO Leadership Chair Council and founding advisor to the Financial Planning Associations of Indonesia and Brunei. He has 3 Masters degrees in Financial Planning & Financial Services, 2 Bachelors degrees in Economics & Insurance, and 13 professional qualifications.

Ms Wendy Wong - Founding Partner, Wong Alliance LLP

Wendy graduated from the University of Singapore (now NUS) in 1978 and was admitted as an Advocate and Solicitor of the Supreme Court of Singapore in the following year. She was also admitted as a Solicitor, England and Wales. Wendy began her 30-year legal career as a legal counsel in a foreign bank. There she built the foundations for her practice in banking and corporate finance. Wendy entered private practice in 1982 and founded Wendy Wong & Partners in 1986. In addition to banking and finance work, Wendy also developed areas of practice in corporate and commercial law, real estate and conveyancing, wills and trust.

In relation to real estate and conveyancing, Wendy handles a broad spectrum of work from retail conveyancing to privatisation of estates and en bloc sale and development. She serves as a member of the Conveyancing Practice Committee of the Law Society.

Wendy has also developed a new area of specialisation in wealth planning. She is a qualified Trust & Estate Practitioner (TEP). She currently sits on the Management Committee of the Society of Financial Service Professionals and the Council of the Financial Planning Association of Singapore.

REGISTRATION FORM

Name (Dr/Mr/Mrs/Miss/Mdm): ______________________________ NRIC No.: ______________ Membership No.: ____________

Name and Address of Organisation: ____

Position in Organisation: ____

Tel number: __________________ Fax number: ________________ Email: ______________________

(A valid email address is required for confirmation of registration.)

TICK ONE	MEMBERSHIP *(Please circle as appropriate.)*	FEES
	Member of Society of Financial Service Professionals (SFSP)	S$30.00
	Others	S$60.00

Payments should be made by cheque. Details below:

Cheque payments should be made payable to **"SOCIETY OF FINANCIAL SERVICE PROFESSIONALS"** & arrive at our office at **"c/o Intellitrain Pte Ltd, 3 Raffles Place #07-01 Bharat Building S048617"** with the completed registration form on or before the closing date, **Friday, 6th August 2010.**

For further enquiries, please contact **Ms. Cheryl Lim, Intellitrain Pte Ltd (Event Secretariat, Society of Financial Service Professionals)**

Tel: (65) 63296496 **Fax: (65) 63299699** **E-mail:** SFSP@intellitrain.biz **Website:** www.sfsp.org.sg

REGISTRATION, REFUND & CANCELLATION POLICY

1. No invoices or receipts will be issued by the Organisers.
2. Registrations will be confirmed upon receipt of full payment accompanied by a duly completed registration form.
3. The Organisers reserve the right to refuse to register or admit any participant, and to cancel or postpone the course.
4. Equivalent substitute delegates are welcomed, subject to the Organisers being notified at least 3 working days before the course of the substitute delegate.
5. The Organisers will not entertain any request for a refund of fees. However a confirmed registrant who has paid in full the course fees but does not turn up for the course will be entitled to collect a set of the materials provided.