

PI ETA CONSULTING COMPANY

Fundamentals of Wealth Management

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OUTLINE FOR FUNDAMENTALS OF WEALTH MANAGEMENT PROGRAM, A 3-DAY PROGRAM

➤ **Introduction**

- What Is Wealth Management And Why It Is Important To Everyone
- Understand The Difference Between Financial Planning And Wealth Management
- Discover Various Key Aspects Of Wealth Management

➤ **Key Wealth Management Needs of Customers**

- Protecting One's Wealth
 - Understanding The Risks That One Is Exposed To
 - Key Risk Management Concepts
 - Concept Of Insurance
 - Maximising Benefits Of Different Life Insurance
 - Term Life
 - Wholelife
 - Endowment Insurance
 - Investment Linked Policies
 - Annuities
 - Provisions Of Life Insurance Policies
 - What Protection Can Other Types Of Insurance Provide
 - Health Insurance
 - Disability Income Insurance
 - General Insurance
 - How Insurance Premiums Are Computed
- Crucial Steps To Effective Wealth Maintenance
 - Cashflow Planning Without Tears
 - Importance Of Liability Management
 - Personal Financial Ratio Analysis
 - Plan For A Achievable Budget
 - Debt Financing – Benefits And Pitfalls
 - Leveraging On Types Of Credit Available
 - Impact Of Personal Bankruptcy
 - Tax Planning (Very Dependant On Loan Rules / Laws)
- How Wealth Accumulation Can Be Achieved / Enhanced
 - Understand The Importance Of “Time Value Of Money”
 - Investment Concepts In The Current Environment
 - Investment Analysis To Enhance Your Wealth
 - Building Blocks In Investments
 - Equities, Derivatives And Other Investments
 - Debt Instruments
 - Unit Trusts
- Maximising Wealth Distribution To Chosen Parties
 - Using Estate Planning To Maximise Wealth Distribution And Retention
 - Importance Of Trusts And Section 73 Of Conveyancing And Law Of Property Act
 - Applying Estate Planning Tools
 - Using Wills To Achieve Your Desired Goals

For more information, please contact PI ETA Engagement Resource (PEER) Group at
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PROGRAM FACILITATOR

Ms. Tay May Lin
B.Acc. (Hons.), CPA, CFP

Ms. Tay May Lin is a Business Domain Expert Facilitator with PI ETA Consulting Company, and a seasoned financial practitioner with over 20 years of banking expertise in consumer banking.

Ms. Tay qualified as a Certified Financial planner in September 2005 and is currently a licensed Financial Advisory Representative engaging clients in the last 4 years. Her key strength is in structuring financial plans to meet the financial objectives of her clients. Prior to her current appointment, she was Vice-President and Head of Sales of Privilege Banking with a regional bank. She has over 20 years of experience servicing the needs of high networth and branch customers.

Besides being a financial practitioner, Ms. Tay has also been sharing her experiences through training courses organized by the Singapore Human Resource Institute (SHRI) and other entities for the past 4 years.