

## Shaping Financial Foundations, Securing Wealth for Tomorrow

### FPAM Annual Signature Financial Planning Symposium 2025 & 25<sup>th</sup> Anniversary Celebration

**Date** : 22 May 2025  
**Time** : 9:00am – 5:00pm  
**Venue** : M World Hotel, 1, Persiaran Bandar Utama, Bandar Utama, 47800 Petaling Jaya, Selangor

#### Itinerary

Time	Programme
8.00am – 9.00am	Registration
9.00am – 9.10am	Welcome Remark by Emcee
9.10am – 9.20am	Opening Address by FPAM President - Alvin Tan
9.20am – 9.35am	Key Note Address by Pn Salmah Bee Mohd Mydin, Executive Director of Market Development, Securities Commission
9.40am – 10.40am	Session 1: <b>Innovative Cyber Insurance, The financial Planning Insights</b>  This opening session explores contemporary approaches to cyber insurance solutions and their relationship with financial planning in today's digital business environment. The discussion aims to provide participants with insights into emerging trends and considerations in these interconnected fields.  By <b>Mr Andrew Hong</b> , <b>Regional Director</b> , <b>Dynarisk</b>
10.40am – 10.55am	AM Break
11.00am – 12.00pm	Session 2: <b>Family Office – A Practical Approach</b>  This session examines the structure and implementation of family office services, focusing on practical aspects of managing multi-generational wealth and family enterprises. Explores key considerations in developing and maintaining effective family office operations to serve the complex needs of high-net-worth families. Additionally, it will cover insights into Multi-Family Office services and their role in wealth management.  By <b>Ms Catherine Yuan</b> <b>Executive Director</b> <b>Confiance Family Office</b>  & <b>Ms Tay Lee Hoon</b> <b>Executive Director</b> <b>Consulting Division</b> <b>Cheng &amp; Co Global Advisory Sdn. Bhd.</b>

12.00pm – 1.00pm	<b>Session 3: The Psychology of Behaviour Change and Influence</b>
	<p>This session explores the psychological principles behind financial decision-making and client behavior in the financial services industry. The discussion examines key behavioral factors that influence financial choices and client relationships, providing financial professionals with insights to enhance their advisory and communication approaches.</p> <p>By <b>Dr. Alvin Ng Lai Oon</b>  <b>Professor at Department of Psychology</b>  <b>School of Medical and Life Science, Sunway Univeristy</b></p>
1.00pm – 1.30pm	FPAM 25 <sup>th</sup> Anniversary Celebration Session 25 <sup>th</sup> Anniversary Commemorative Book Launch
1.30pm – 2.30pm	Lunch
2.30pm - 3.30pm	<b>Session 4: AI, ChatGPT, and DeepSeek: Impact, Challenges, and Opportunity</b>
	<p>As artificial intelligence continues to advance, tools like ChatGPT and DeepSeek are transforming the landscape of various industries, including finance, technology, and customer service. This presentation will delve into the significance of these AI technologies, exploring their impacts, the challenges they pose, and the opportunities they create for professionals and businesses alike.</p> <p>By <b>Robin Hoo</b>  <b>Founder and COO,</b>  <b>Director and Co-Founder of PAiX Tech Sdn Bhd.</b></p>
3.30pm – 4.30pm	<b>Session 5: CFP Certification: Elevating Professional Excellence, Client Trust, and Business Growth</b>
	<p>This interactive panel explores how CFP certification serves as a catalyst for professional development and business enhancement in the financial services industry. Industry leaders share perspectives on how the designation builds client confidence, enhances service quality, and creates opportunities for practice growth, offering practical insights for professionals considering or pursuing CFP certification.</p> <p>Moderated by <b>Dr Jack Lin</b>  Panellist:  <b>Rafiq Hidayat   Terence Ng   Dr Jeffrey Chiew   Dr Calvin Cheong</b></p>
4.45pm – 4.50pm	Ending Remark by Emcee
4.50pm – 5.00pm	Closing Speech by GM