

# KL Conference on Islamic Wealth Management

(KLC-iWM-2011)



“An international gathering of practitioners, scholars and experts to discuss and share their knowledge, expertise and experience on the principles, instruments and issues related to Islamic wealth management and financial planning to be held at the world’s leading Islamic financial centre...Kuala Lumpur.”

6-7 July 2011 ❖ The Royale Chulan Hotel, Kuala Lumpur, Malaysia

This 2-day conference will explore the key principles and avenues of Islamic wealth management which includes Islamic wealth creation, accumulation, protection, distribution and purification in the Wealth Management Cycle. This conference will enable individuals, investors and corporations to learn and understand more about the Islamic wealth management and financial planning from industry experts with wide spectrum of expertise and will be able to implement them. This conference will also be an excellent platform for networking and exchange of experience, ideas and outlooks about the industry and services.

Organised by



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Kuala Lumpur



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London

## KEY FOCUS

- ❖ Financial Planning & Wealth Management: An Overview
- ❖ Islamic Funds Management & Investment
- ❖ Sukuk
- ❖ Tax Planning for Individuals
- ❖ Retirement Planning: Managing Wealth for Golden Years
- ❖ Islamic Estate Management (Faraid, Wills, Hibah, Waqf)
- ❖ Risk Management and Takaful (Wealth Protection)
- ❖ Tax Planning
- ❖ Zakat: Wealth Redistribution and Purification
- ❖ The Need For Prudent Financial Management

## WHO SHOULD ATTEND

- ❖ Financial planners
- ❖ Wealth advisors
- ❖ Financial consultants
- ❖ Bankers
- ❖ Insurance operators
- ❖ Unit trust agents
- ❖ Insurance / Takaful agents
- ❖ Remisers
- ❖ Lawyers
- ❖ Academicians
- ❖ Entrepreneurs
- ❖ Other professionals

organiser : [www.alfalahconsulting.com](http://www.alfalahconsulting.com)  
event site : [www.islamic-wealth-management.net](http://www.islamic-wealth-management.net)

## CONFERENCE DAY 1

- 8.00 Registration And Coffee
- 9.00 Welcome Remarks and Keynote Address  
*Ahmad Sanusi Husain*  
*CEO & Chief Consultant, Alfalah Consulting*
- 9.15 **Islamic Financial Planning & Wealth Management: An Overview**
- Islamic worldview of financial planning & wealth management
  - Differences between Islamic and conventional wealth management & financial planning
  - Industry outlook
  - Prospect & Challenges
- Ahmad Sanusi Husain*  
*CEO & Chief Consultant, Alfalah Consulting*
- 10.15 Tea Break and Networking Session
- 10.45 **Islamic Funds Management & Investment**
- Islamic funds Industry today
  - Islamic financial instruments available for investments
  - Growth of new Islamic funds: Islamic REITs etc
- Damshal Awang Damit*  
*Managing Director,*  
*Amundi Islamic Asset Management Malaysia*
- 11.45 **Sukuk : The Products and the Market Trend**
- Sukuk as a preferred source of funding and investment
  - Various types of sukuk
  - Advantages of sukuk
- Damshal Awang Damit*  
*Managing Director,*  
*Amundi Islamic Asset Management Malaysia*
- 12.45 Lunch and Networking Session
- 2.00 **Islamic Estate Management**
- Introduction to Islamic estate management
  - Faraid , wills, hibah
- Ahmad Saruji Abdul Aziz*  
*Senior Manager, Channel Management*  
*AmanahRaya Berhad*
- 3.00 Tea Break and Networking Session
- 3.30 **Islamic Estate Management**
- Waqf (endowment)
  - Current issues and challenges in Muslim estate management
- Ahmad Saruji Abdul Aziz*  
*Senior Manager, Channel Management*  
*AmanahRaya Berhad*
- 5.15 End of Day One

## CONFERENCE DAY 2

- 9.00 **Risk Management and Takaful (Wealth Protection)**
- Mitigating risk using Takaful
  - Concepts for Takaful Products
  - Mechanism of Takaful
  - Takaful models
  - Why Takaful is required?
- Hassan Omar Ahmed*  
*CEO, Elite Risk and Wealth Management*
- 10.00 Tea Break and Networking Session
- 10.30 **Retirement Planning: Managing Wealth for Golden Years**
- Changing personality for future betterment
  - Planning for Self and Family
  - Financial planning through savings and investment
  - Resources for retirees
- Hassan Omar Ahmed*  
*CEO, Elite Risk and Wealth Management*
- 11.30 **Tax Planning for Individuals**
- Effective tax planning
  - Tax rebates and exemptions
  - IRB laws/rulings/regulations
- Musa Othman*  
*Secretary*  
*Malaysian Association of Tax Accountant (MATA)*
- 12.30 Lunch and Networking Session
- 2.00 **Zakat: Wealth Redistribution and Purification**
- Understanding Zakat
  - Zakat planning for Individual & Corporation
  - Tax provision on Zakat
  - Statistics on Zakat collection & distribution
- Mohd Rais Alias*  
*General Manager, Zakat Collection Centre (PPZ)*  
*Federal Territory Islamic Council (MAIWP)*
- 3.00 Tea Break and Networking Session
- 3.30 **The Need For Prudent Financial Management**
- Understand financial management
  - Make the right choice in handling debt problems either via counseling or debt management program (DMP) enrolment
  - Understand how the DMP works and it's effect
- Credit Counseling and Debt Management Agency*  
*- Agensi Kaunseling dan Pengurusan Kredit (AKPK)*
- 5.15 End of Conference

## ABOUT ALFALAH CONSULTING

**We** are a global provider of consulting, advisory and training services in the areas of Islamic finance, wealth management and personal development. We have outstanding professionals working together to deliver excellence and value.

**We** are committed to continuously strive in becoming a world-class consulting and training provider by translating that to our valued clients with a dedication and enthusiasm to deliver the highest standard of professional consulting, advisory and training.

### Our professional services:

- o Consultancy
- o Advisory
- o Training
- o Research & Development



Islamic Finance Forum

### Our areas of focus:

- o Islamic finance
- o Islamic wealth management
- o Islamic financial planning
- o Management and leadership
- o Personal development



Local & International delegates



Networking Opportunities



Seminars & Conferences

## SPONSORSHIP & EXHIBITION

This high profile event provides your company with the unique opportunity to capture the interest and influence the decisions of a highly target audience. Capitalize on the ideal platform to market your services and form strategic relationships through networking.

## IN-HOUSE TRAINING

We offer customized training solutions to meet your specific training needs:

- Management
- Business
- Finance
- Islamic Finance
- Personal Development etc



Training can be conducted in English or Bahasa Malaysia at the comfort of your own office or training centre.

For enquiries:

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## OUR PAST ATTENDEES

- Bank Negara Malaysia
  - Bank Islam Malaysia Berhad
  - Bank Muamalat Malaysia Berhad
  - Bank Kerjasama Rakyat Malaysia
  - EONCAP Islamic Bank Berhad
  - Hong Leong Islamic Bank Berhad
  - HSBC Bank (M) Berhad
  - Malayan Banking Berhad
  - OCBC Bank (M) Berhad
  - Public Bank Berhad
  - SME Bank Berhad
  - The Royal Bank of Scotland
  - Export-Import Bank Berhad
  - Bank Simpanan Nasional
  - Al-Rajhi, KSA
  - Bank Islam Brunei Darussalam
  - Emirates Bank, UAE
  - Punjab Provincial Cooperative Bank Limited, Pakistan
  - Bank Negara Indonesia
  - Bank Himpunan Saudara, Indonesia
  - Bank Muamalat Indonesia
  - Ariff & Co
  - Conyers Dill & Pearman (UK)
  - Feroz & Co
  - Freehills (Singapore)
  - Lee Hishamuddin Allen & Gledhill
  - Nasirs (HK)
  - Sidek Teoh Wong & Dennis
  - Sadari & Partners (Singapore)
  - Shook Lin & Bok (Singapore)
  - Universiti Malaya
  - Universiti Kebangsaan Malaysia
  - International Islamic University Malaysia
  - Universiti Utara Malaysia
  - Universiti Teknologi MARA
  - Universiti Putra Malaysia
  - Universiti Tuanku Abdul Rahman
  - Universiti Brunei Darussalam
  - Medina College of Technology, KSA
  - Cityhomes Pte Ltd
  - Lanka Ecom Technologies Ltd (Sri Lanka)
  - Scotia Capital (Canada)
- ...and many more (more than 200 organisations including for the previous company's name, GlobalPro Consulting)

**Alfalah**  
**CONSULTING**



## DETAILS OF PARTICIPANTS

Name (1)	:	_____
Designation	:	_____
E-mail	:	_____
Name (2)	:	_____
Designation	:	_____
E-mail	:	_____
Name (3)	:	_____
Designation	:	_____
E-mail	:	_____
Organisation	:	_____
Address	:	_____
	:	_____
Telephone	:	_____
Fax	:	_____
TOTAL	:	_____
Contact person	:	_____
Designation	:	_____
E-mail	:	_____

**SAVE RM300**

when register & pay by  
31 May 2011

**Early Bird Fee:**

Registration with payment  
by 31 May 2011

Malaysian : RM1,700  
International : USD700

**Normal Fee:**

Registration with payment  
after 31 May 2011

Malaysian : RM2,000  
International : USD800

Special fee for Malaysian university lecturers : RM1,000  
(group discount not applicable)

Fee is inclusive of lunch, refreshments and seminar package only.

**Group Discount:**

Enjoy **10%** discount for 3 or more delegates registered from the same organisation and the same billing source.

**Payment:**

Payment should be made by crossed Cheque/Bank draft payable to **Alfalah Consulting**. Payment can also be made directly to our bank account / telegraphic transfer. Official receipt will be issued upon receipt of payment.

**Replacement & Cancellation:**

Replacement of participant is allowed. Please provide the name & title of the substitute delegate at least 4 working days prior to the event. 7 days notice is required for cancellation.

The organiser:



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