



The Institution of Engineers, Malaysia

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E-Legacy Planning and E-Retirement Planning for Engineers in E-Knowledge Era

Organized by Women Engineers Sections, IEM

BEM Approved CPD/PDP Hours: Applying

Date : 23rd November 2016 (Wednesday)
Time : 5.30pm – 7.30pm (Refreshment will be served at 5.00pm)
Venue : TUS and C&S Lecture Room, 2nd Floor Wisma IEM, Petaling Jaya
Speaker : Mr. Lim Cheng Guan

SYNOPSIS

Engineers should be aware that E-retirement solution is currently a global issue in E-knowledge era. Despite advanced technology and internet booming with easy access to knowledges, still not many Malaysians has proper E-retirement planning. This is supported by the following facts that a) Every 2 out of 3 members of EPF (@ age 54) has < RM50,000 in EPF account, b) Average EPF account balance per member is about RM167,000. The “2nd EPF “E-solution can be part of the consideration as technology advances.

In this talk, E-Legacy Planning should take into consideration since there are lots of uncertainties and natural disasters. The assets will be frozen upon death, it takes years to go through the stage of application of Probate, Extract of Probate, collection of Assets, clearance on tax and debts, prior to the distribution of asset to the appointed beneficiaries. Hence, we shall consider the advantage of FSA schedule 10 (Trust of Policy Money), the E-insurance proceeds can be a creditor proof solution. These advanced technology and E-planning services will be paid to the nominee or beneficiaries within a short period.

BIODATA OF SPEAKER

Lim Cheng Guan is currently Head of Banwide Bancassurance of United Overseas Bank (Malaysia) Bhd. He has nearly 15 years working experience in Bancassurance industry since he graduated in Bachelor of Science degree in the year 2000 from University Malaya. He went on to do his Master of Science (Statistics) in 2003. He owned an actuarial profession since 2012 and followed a profession in CFA in year 2013.

During his years working experience in Banking and Insurance Industry, he has gained vast experience in Insurance actuarial valuation, Pricing, reinsurance and Product pricing and development. During his recent role as Head of Bancassurance of few banks, he has been actively involved in Bancassurance Product Marketing where he will occasionally share the benefits and how importance as Wealth Creation, Wealth Accumulation, Wealth Preservation and Wealth Distribution for an individual / families

Ir. Assoc Prof Leong Wai Yie
Chairman
Women Engineers Section

ANNOUNCEMENTS TO NOTE

- Preferential admission to talk shall be accorded to IEM members (pre-registration and online registration are NOT required). Telephone and/or fax reservation will NOT be entertained.
- **Non members** may also attend the talk but will need to pay a registration fee of **RM50** and an administrative fee of **RM15**. GST is inclusive.
- For members of affiliated organisations, there will be no registration fee payable. However, they are requested to produce their membership card as proof of membership. For the list of affiliated organisations, please refer to IEM website at www.myiem.org.my under International/MoU.
- Limited seats are available on a "first come first served" basis (maximum 100 participants).
- IEM members are required to produce membership cards for confirmation of attendance (CPD purpose).
- Latecomers will not be allowed to enter if the lecture hall is full nor be entitled to CPD.
- **IEM members who fail to produce their membership cards will be charged a fee of RM25.00. GST is inclusive.**

ADMINISTRATIVE FEE

- Kindly be informed that an administrative fee of **RM15** is payable for talks organized by IEM. GST is inclusive.
- The fee would be used to cover overhead costs, building maintenance expenses as well as contribute to Wisma IEM Building Fund.
- All contributions will be deeply appreciated by IEM.
- Student Members are however exempted.

CPD HOURS CONFIRMATION

Name:

Membership No:

Signature: