SIDC CPE-APPROVED & HRDF CLAIMABLE COURSE

SUSTAINING FAMILY BUSINESS THROUGH FAMILY OFFICE MODEL

24th April 2021 (Saturday) 9am to 5.30pm, Zoom Meeting

Entitled to 10 CPE (SIDC) points and 7 CPD (FIMM) points

The Speaker

NG CHEE YONG

- Executive Director/CEO of CC Advisory Sdn Bhd
- Specialised in Business Succession Planning, Family Office, Family Government & Constitution, Retirement Planning and Wealth Preservation.

KANG SIN LOON (ALEX)

- Strategy Development & HR Director of Cheng & Co
- Executed Professional Talent Development programs and KPI performance measurement through Balanced Scorecard (BSC).

Price

- RM 328 (Bankers & Member of Professional Association)
- RM 348 (Public)

Early Bird RM 298

What's in the course?

- Understanding Family Office Concept
- The Overview of Family Office Model
- The Construction of Family Office
- Case Study Discussion
- Formulating Your Family Office Structure

What Can You Learn?

- Discuss the importance of Family Office model and family business constituency model in sustaining the family business.
- Identify the necessary steps to create a sound Family Office structure.
- Analyse the various Family Office models through case study analysis

Contact Us:

03-7985 9999 / 017-704 0880 (Ms Tan)

training@ccadvisory.com.my

HRDF CLAIMABLE WORKSHOP

Title	: **Sustaining Family Business Through Family Office Model**
Date	**:** 24th April 2021
Time	**:** 9 am to 5.30 pm (Please login 10 minutes earlier before the training)
Venue	**:** Zoom Meeting
CPE/CE/CPD	**:** 10 CPE Points / 7 CPD Points
HRDF Claimable	**:** Yes
Facilitator	**:** CC Advisory Sdn Bhd
Speaker	**:** Ng Chee Yong / Kang Sin Loon (Alex)

Learning Outcome:

At the end of this course, the participants will be able to

1. Discuss the importance of Family Office model and family business constituency model in sustaining the family business.
2. Identify the necessary steps to create a sound Family Office structure.
3. Analyse the various Family Office models through case study analysis

Learning Outline:

Time	Details
9.00 – 9.30 am	Chapter 1: Understanding the Family Office Concept • What is Family Office? • What are the advantages of Family Office? • What is the impact of Family Office in family business succession planning?
9.30 – 10.30 am	Chapter 2: The Overview of Family Office Model • Understanding Family Demographic and Family Tree • Onshore and offshore Family Office Structure • Analyse Family Office Model and Constitution Structure
10.30 – 10.45 am	Break
10.45 – 12.30 pm	Chapter 3: The Construction of Family Office

	• Step 1 – Family Office in Exchange of Individual Ownership. • Step 2 – Step up Memorandum of Wishes for Family Office. • Step 3 – Family Office to be owned by Family Trust • Step 4 – Step up Memorandum of Wishes for Family Trust. • Step 5 – Combining Family Government and Business Structure
12.30 – 1.30 pm	Lunch Break
1.30 – 3.30 pm	Chapter 4: Case Study Discussion • Case Study 1: LEE KUM KEE - A Family Enterprise Whose Wealth Lasts Over Five Generations • Case Study 2: EU YAN SANG - Breaks Third Generation Curse • Case Study 3: IKEA – Bulletproof Foundation Structure
3.30 – 3.45 pm	Break
3.45 – 5.00 pm	Chapter 5: Formulating Your Family Office Structure • Case Study – GENTING Group Family Feud Casts Cloud Over Genting Group Empire • Based on the case study, formulating your proposed family office structure • Group discussion and present your case study
5:00 – 5:30 pm	Q & A

Profile of Ng Chee Yong

Ng Chee Yong, Malaysian, 47

Executive Director / CEO of CC Advisory Sdn. Bhd.

Ng Chee Yong is our Group's Head of Financial Planning. He is responsible for overseeing and managing the overall financial planning activities of our Group. He obtained Diploma in Material engineering from Tunku Abdul Rahman College in 1997. He then graduated with a Masters in Engineering Business Management (EBM) from University of Warwick in 1999. He obtained Diploma in Estate Agency from Malaysia Board of Valuers, Appraisers and Estate Agents Malaysia in 2017. He is also a Certified Financial Planner with the Financial Planning Association of Malaysia since 2007. He also holds a Capital Market Service Representative License (CMSRL) from Security Commission Malaysia since 2008. He is also a Financial Adviser Representative with Bank Negara Malaysia (BNM) since 2013.

Upon graduation, he commenced his career as a Process Engineer in Advance Semiconductor Engineering Malaysia (ASEM) as process engineer where he was involved in various equipment- and process-related activities in 2000. He was promoted to Process Engineer II at 2004 before left the company to pursue this career in Kuala Lumpur, whereby he ended up become Sales Engineer with Sandvik Malaysia at 2004 where he learned his sales traits. After two and half years in Sandvik Malaysia, he decided to move to build the career in financial planning. After obtained the Licensed Financial Planner status in 2007, Ng Chee Yong commenced his journey as financial planner at CIMB Wealth Advisors Sdn. Bhd. He has written more than 100 charged financial plans from 2007 to 2012. He specialized in Business Succession Planning, Family Office, Family Government & Constitution, Retirement Planning and Wealth Preservation.

He assumed his present position as our Group's Head of Financial Planning from 2012 until present. Inspired by Blue Ocean strategy, his main strategies in Cheng & Co are adopting Product Simplification that simplify the financial products offering as well as create financial planning Blue Ocean services that able to avoid market competition.

Profile of Kang Sin Loon (Alex)

Strategy Development & HR Director of Cheng & Co

Alex Kang is hugely passionate about human relations and human capital development. As the Group's Director of Strategy Development and Human Resources, Alex is responsible for executing Professional Talent Development programs and KPI performance measurement through Balanced Scorecard (BSC). He is also a board member of Cheng & Co International Corporate Office (CCIB).

Before joining Cheng & Co, Alex worked with Jordan Oral Care Company. As the Head of Finance and HR for the Asia-Pacific Region, his experience extends to working within the Asia-Pacific region countries such as Thailand, Vietnam, China, Indonesia, and Korea.

Alex Kang is an Accounting Degree holder and an HRDF TTT Certified Trainer. He is actively involved in non-governmental organization community service initiatives and appointed as General Deputy Treasure of Malaysia International Commerce, Culture & Arts and Facilitation Association (MICAFA). In recognition of his talent, career progression, and professional success, Alex Kang has been nominated for the Fellowships from Meinders School of Business of Oklahoma City University, USA.

HRDF CLAIMABLE WORKSHOP

REGISTRATION FORM

*Please register with us through the link below:

Online registration form: < https://share.hsforms.com/1eOob5h1SSiKvIBsGIlKF5g5do0j >

Title of Workshop:	**Sustaining Family Business Through Family Office Model**
Facilitators:	CC Advisory Sdn Bhd
Speaker:	Ng Chee Yong / Kang Sin Loon (Alex)
Date:	24th April 2021
Time:	(Please login 10 minutes earlier before the training starts)
Venue:	Zoom Meeting
Fees:	• **Early Bird: RM 298** • Banker, Member of Professional Associate: RM 328 • Public: RM 348
Points:	10 CPE Points / 7 CPD Points
HRDF Claimable:	Yes
Instructions:	Please fill in this registration form and email to training@ccadvisory.com.my.
Payment/Invoice:	**By cash/online transfer:** Please email us the payment receipt to training@ccadvisory.com.my Bank in details as follow: If you wish to claim for SIDC, please bank in to **Bank: Maybank** **Account Name: CC Advisory Sdn Bhd** **Account Number: 5141 1466 4056** If you wish to claim for HRDF, please bank in to **Bank: Maybank** **Account Name: Pro-B Centre Sdn Bhd** **Account No: 5141 1444 5193**
Enquiries	Shall you have any enquiry, please email to training@ccadvisory.com.my or call Ms Tan at 017-704 0880
Terms and Conditions:	• Registration is on a first-come-first-served basis. • Confirmation is subject to payment before the course. • CC Advisory reserves the right to amend the program, speaker, date, venue, etc without prior notice

REGISTER WITH US AND GRAB THE EARLY BIRD PRICE!