

Business Value Protection Trust Seminar

1-Day Seminar to learn HOW to help your clients to protect their business value Now and Future



When the business one builds begins to bear fruit and the future of the business looks bright, the wealth of the business owner continues to grow. The next step for a business owner is to plan for his estate including devising an exit strategy from the business he built but at the same time to ensure continuation of the business by the co-owners as well as protecting the value of that business.

Business value protection or business succession involves planning for the smooth transfer and continuation by the co-owners due to retirement, death, illness or disability. This seminar will answer key questions for business owners such as:

- When a business owner decides to retire or suffers a life threatening illness or dies, is there a proper exit strategy put in place?
- Is the exit strategy stated in writing to ensure smooth transfer and continuation of the business? Has it been structured properly?
- In the event of death or disability, can the heirs of the business owner manage the business with the co-owners? If no, will the heirs be compensated in any way to ensure adequate income for them?
- Will the co-owners have the available funds to be able to purchase your interest or shares when the time comes to do so?

Key Seminar Topics

- Types of business suitable for Business Value Protection**
 - Sole proprietorship, partnership, private limited company and public listed company
- The Business Value Protection concept**
 - Protecting the business value
 - Problems involved without the protection
 - Outline of the components for Business Value Protection
 - Funding: insurance and alternatives for Muslims and non-Muslims
- Components of Business Value Protection**
 - Buy-Sell or Buyout agreement and issues for consideration
 - Option agreement – when it should be used and issues for consideration
 - Power of attorney – types and usages
 - BVP Trust – structure and important elements for Muslims and non-Muslims
- Critical analysis of some existing plans**
 - Without power of attorney and trust
 - Funding by Key-man insurance
- Advantages of Business Value Protection Trust package**
- Panel Speakers' Questions & Answers**

Speakers' Profile



AZRINA TUMAR

Partner, Messrs. Lee Choon Wan & Co

Azrina graduated in 1998 from the University of Buckingham with an honours degree in law and prior to that has obtained a Diploma in Public Administration from the University Technology Mara, Shah Alam. Upon being admitted as an Advocate and Solicitor of the High Court of Malaya in 2001, she joined Messrs. Siti Haja Teh, Azreen & Khuan as a litigation lawyer and thereafter moved on to Messrs Lee Choon Wan & Co. She was involved in corporate litigation, family matters, industrial relations, probate and administration and other general litigation matters. Azrina's current scope of work is concentrated in general corporate matters including drafting and advising on buy-sell agreements, shareholders' agreements, joint ventures, put-options, sale purchase of shares and etc.



AZHAR ISKANDAR HEW

General Manager, Rockwills Trustee

Azhar holds the Bachelor of Laws (Honours) degree from the University of London. He has 10 years experience in the estate planning industry as a will & trust specialist, trainer and conference speaker. Over the years he has trained about 5000 people primarily from leading financial institutions and life insurance companies as well as financial planners in Malaysia, Hong Kong and Singapore. He is one of the few advocates of Islamic estate planning in this country. He is approved by Securities Industry Development Centre (SIDC) as a facilitator to conduct Trust Planning Training and was appointed as one of the Technical Advisor for a financial planning company. His current scope of work includes advising on legal aspects and compliance matters regarding Estate Planning, Private Trust and Corporate Trust services. He contributes regularly to Smart Investor and Malaysian Business on the area of Estate Planning and Private Trust.

Seminar Fee : Rockwills Member RM180.00 / Non-Rockwills Member RM380.00

Early Birds by 31 Oct 07 : Rockwills Member RM150.00 / Non-Rockwills Member RM300.00

(Seminar Fee includes seminar materials, certificate, lunch and 2 tea/coffee breaks.)



Accredited for 8 CPD Hours
Malaysian Financial Planning Council

Rockwills Business Solutions Sdn Bhd (62653-U)

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Rockwills
BUSINESS SOLUTIONS

This 1-Day Seminar will help you achieve:

- The ability to identify opportunities for estate planning in particular for business value protection.
- The knowledge to ask relevant and important questions to determine the need for business value protection.
- The ability to answer clients' questions on the structure of business value protection and ancillary matters such as the valuation, funding, agreement, tax implications, power of attorney and usage of trust.
- The ability to make full use of insurance planning as the funding option to help clients hence creating big insurance cases.
- The realization that certain existing funding and structures without all the components of business value protection cause material losses to the client and his heirs.
- The dos and don'ts when advising clients' on business value protection.

Who to attend?

- Professional Will Writers
- Professional Estate Planners
- Financial Planners and Advisors
- Insurance Consultants
- Unit Trust Consultants
- Financial Intermediaries
- Bankers
- Lawyers
- Accountants
- Tax Agents

REGISTRATION FORM

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For ROCKWILLS Members: *(please tick corresponding box)*

Seminar Fee:

- Early Birds before 31/10/07 : RM150.00
- Normal Fee after 31/10/07 : RM180.00

Seminar Session:

- 14 Nov 07 : Puteri Pacific Hotel, Johor Bahru
- 21 Nov 07 : Berjaya Georgetown Hotel, Penang
- 27 Nov 07 : CITITEL Mid Valley, Kuala Lumpur

For Non ROCKWILLS Members: *(please tick corresponding box)*

Seminar Fee:

- Early Birds before 31/10/07 : RM300.00
- Normal Fee after 31/10/07 : RM380.00

Seminar Session:

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- 27 Nov 07 : CITITEL Mid Valley, Kuala Lumpur

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Terms & Conditions:

RBS reserves the right to amend or cancel this seminar where the occasion necessitates. In such circumstances, a full refund of any seminar fee will be made but RBS shall accept no further liability. Confirmation of registration is based on full payment of seminar fee received by RBS. Cancellations less than 2 weeks before the seminar will not be allowed and no refund will be made by RBS. The difference of seminar fee will have to be paid for substitution by a non Rockwills Member for a Rockwills Member. Only Rockwills Members are eligible to attend BVPT Follow-up sessions.

For further information, please contact RBS : 03-7781 1993 or email: rbs@rockwills.com

Contact Person: Reeca (017-888 6420) / Agnes (012-639 6798)

THE ORGANISER

RBS is a wholly owned subsidiary of Rockwills International Group, Malaysia's No. 1 Professional Will writing and Will custody services Company since 1995. The Group also provides through its associates and subsidiary Trustee Companies offering both the Islamic and non-Islamic Professional Trustee Services. RBS is set up as a one-stop financial services support centre to service the needs of financial planners / sales professionals by linking them to a comprehensive range of value added financial products and services to assist them towards building a lifetime relationship with their clients.

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