

FUEL YOUR BUSINESS

Principal's SME & Corporate Seminar

07 June 2023, Eastern & Oriental Hotel Penang
Macalister Ballroom



Wong Loke Chin
Head of Fixed Income
Principal Malaysia

Wong Loke Chin is a seasoned Portfolio Manager with more than 25 years of relevant experience in managing fixed income investments for retail, institutional, corporate and insurance clients. He joined Principal (formerly known as CIMB- Principal) in January 2005 from CIMB's Debt Markets and Derivatives Department where he managed fixed income portfolios of Institutional clients. Prior to joining CIMB in year 2001, he has with him more than 6 years' experience in fixed income investment in the insurance industry. Wong has also garnered 3 times award winner with Malaysia's Employees Provident Fund in 2015, 2016 & 2018.

Qualification:

Wong holds a Bachelor of Commerce from University of New South Wales, Australia, and is a member of the Financial Markets Association Malaysia. He obtained his fund manager's representative's license in January 2005.



Bernard Yap
Head of Private Client Services and Financial Services within the Tax Practice in Ernst & Young Malaysia

Bernard currently heads the Private Client Services and Financial Services within the Tax Practice in Ernst & Young Malaysia. He has 28 years of experience in providing tax advisory, planning and compliance services to financial institutions, multinational corporations (MNCs), private companies, family businesses, private equity, venture capital companies and asset management companies as well as high-net-worth individuals. Bernard is a member of the Malaysian Institute of Accountants (MIA), the Chartered Tax Institute of Malaysia (CTIM) and a Fellow member of CPA Australia. Marketing, and Networking.



Theresa Goh
Chief Executive Officer / Founder
TG Consulting Sdn Bhd

Theresa is the Founder and CEO of TG Consulting Sdn Bhd. Prior to TG, she was a Senior Tax Partner in Deloitte South East Asia for 19 years. In a career spanning more than 40 years in Deloitte, 37 of which was in taxation, she served major multinational clients in addition to domestic corporates.



Zainal Azman Abu Kasim
Acting Director of Investment Division
Northern Corridor Implementation Authority (NCIA)

Mr. Zainal Azman bin Abu Kasim is currently the Acting Director of Investment Division at Northern Corridor Implementation Authority (NCIA) an agency under the Ministry of Economy. He is a much respected speaker on business facilitation and Foreign Direct Investment (FDI). He possesses deep insight and experience in trade, investment, and government relations, particularly in business structuring, investment facilitation, and business development. Specialization: Management, Business Strategy, Technology Commercialization, Financing, Marketing, and Networking.



Jaya Balan Kathiravalu
Head SME Banking
CIMB Bank Malaysia

Mr KJ Balan is the Head of SME Banking, Group Commercial Banking CIMB, since October 2018 and prior to that he was the Head of Business Development with a local bank. He has a total of 34 years experience in banking from operations, sales and account management, credit, strategy and planning and transformation for SME Business. He has a Bachelor degree in Economics, Master in Management and is a Certified Credit Professional.

Seminar Agenda

Time	Programme
9:00 am	Registration Welcome Remarks
9:30 am	Benefits of Investing in Money Market Funds Wong Loke Chin , Head of Fixed Income, Principal Malaysia
10:30 am	Coffee Break
11:00 am	Legacy Planning in Malaysia Bernard Yap , Head of Private Client Services and Financial Services within the Tax Practice in Ernst & Young Malaysia
12:00 pm	Lunch
1:00 pm	Identifying Tax & Transfer Pricing Risks and Using Voluntary Disclosure To Mitigate These Effects of Such Risks Theresa Goh , Chief Executive Officer / Founder, TG Consulting Sdn Bhd
2:00 pm	Investment opportunities for Northern Corridor Zainal Azman Abu Kasim , Acting Director of Investment Division Northern Corridor Implementation Authority (NCIA)
3:00 pm	Coffee Break
3:30 pm	SME - Challenges and Opportunities Jaya Balan Kathiravalu , Head SME Banking, CIMB Bank Malaysia
4:30 pm	Event Ends

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