

AVA Wealth Consultancy

- Kelen Wong Sin Yi
- 01 Feb 2021 ~ 30 Apr 2021



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01.

PART ONE

Introduction



01. Introduction

Name: Wong Sin Yi

Nickname: Kelen

University: Southern University College
(SUC)

Course: Bachelor in Human Resource Mgt

Year Study: 4 years

Hometown: Johor Bahru





02.

PART TWO

Activities Experience



02. Activities Experience



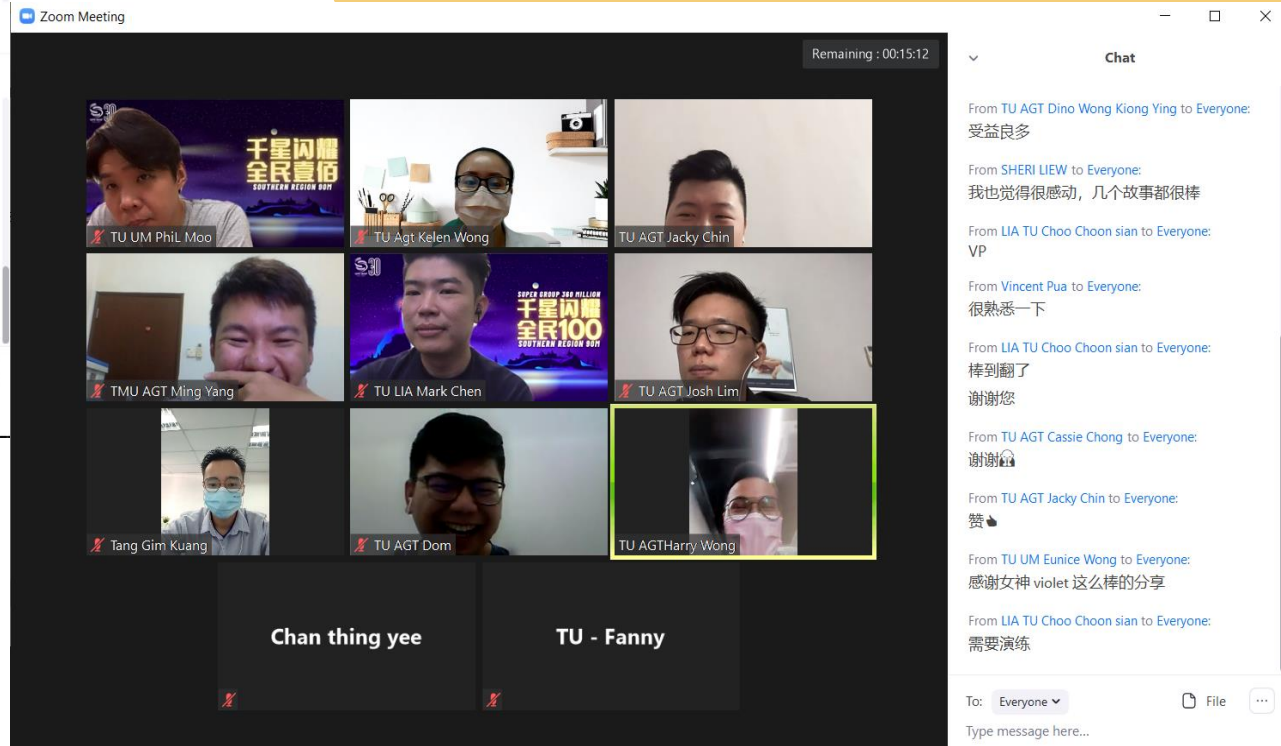
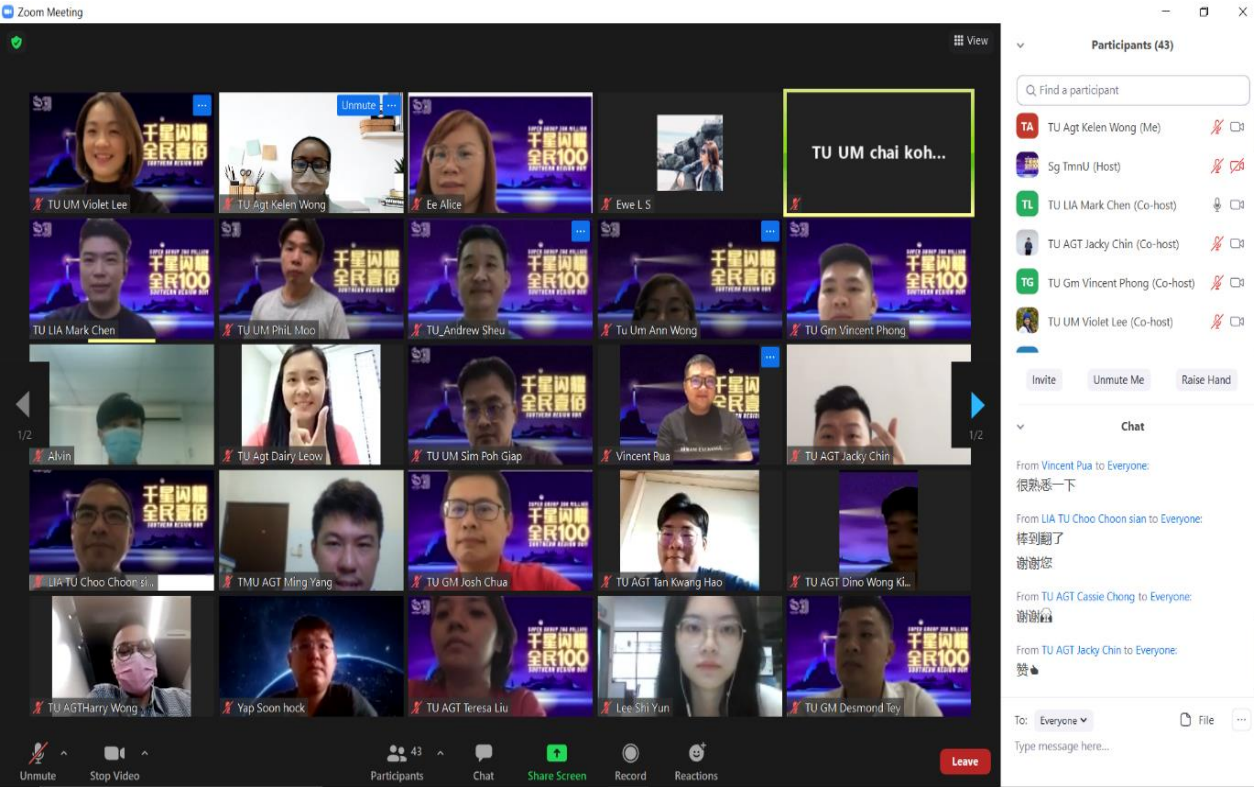
Morning meeting and Nite meeting

Every week can listen Positive Inspirational Seminar

02. Activities Experience

Morning meeting and Nite meeting

Online Seminar by using Zoom Meeting Apps



02. Activities Experience

Cash Flow Game

“Ran Out Rat Race”



02. Activities Experience

 **ZOOM BTC JUNIOR**
Only For Agent Less than 12 months / Not yet contract



Date: 27 March 2021 (Sat)
Time: 9.30am – 1pm

MODULE 1
Customer Fact Find & Needs Analysis
Income Protection Planning
Debt Cancellation Planning
Education Protection Planning
Medical/Healthcare Planning (MHI)

RM10 per MODULE + 1 FREE REVISION
* within 3 Months From The Paid Class

Bank-in to SG WEALTH MANAGEMENT SDN BHD (RHB 21442800035890)
Email the bank-in slip to sgtnr.btc@gmail.com
- Please ensure your email address is registered correctly without any error.
- Participants who did not attach their bank-in slip to email above will not be entertained.
- Registration Close 3 Days Before The Class / Upon Reach 80 pax

KINDLY REFER TO THE LINK FOR REGISTRATION

 **ZOOM BTC JUNIOR**
Only For Agent Less than 12 months / Not yet contract



Date: 28 March 2021 (Sun)
Time: 9.30am – 1pm

MODULE 2
Insurance Generic Terms
Medical Rider
Traditional Policy Features

RM10 per MODULE + 1 FREE REVISION
* within 3 Months From The Paid Class

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KINDLY REFER TO THE LINK FOR REGISTRATION

 **ZOOM BTC JUNIOR**
Only For Agent Less than 12 months / Not yet contract



Date: 3 April 2021 (Sat)
Time: 9.30am – 1pm

MODULE 3
Investment Link Plan
Product Disclosure Sheet & Sales Illustration
Smart Protect Essential 3

RM10 per MODULE + 1 FREE REVISION
* within 3 Months From The Paid Class

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KINDLY REFER TO THE LINK FOR REGISTRATION

 **ZOOM BTC JUNIOR**
Only For Agent Less than 12 months / Not yet contract



Date: 4 April 2021 (Sun)
Time: 9.30am – 1pm

MODULE 4
Product Disclosure Sheet & Sales Illustration
Smart Protect Junior
Smart Protect Wealth 20

RM10 per MODULE + 1 FREE REVISION
* within 3 Months From The Paid Class

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KINDLY REFER TO THE LINK FOR REGISTRATION

Numerous Interesting Learning Activities

02. Activities Experience

SG TMN U

2

Mar

Tues 8-9.30pm

双管齐下



Wan Zhi Xuan
UM

VINCENT
PUA
COT



扩大格局，突破自我

6 APR 2020, 7.30PM-9.30PM
SG TMN U

优秀是种习惯

SgTmnU
30/03/2021
7.30pm-9.30pm

ANDY LIM
GM

CASHFLOW GAME
A Games that you MUST play ONCE in your lifetime!

Date : 05. Mar. 2021 (Fri)
Time : 9am - 12pm
Venue: SG Taman U (23A)
Fees : RM39/pax (Include Snacks & Drinks)

175th session!

E EMPLOYEE You Have a Job	B BUSINESS OWNER You Own a System & People Work for You
S SELF EMPLOYED You Own a Job	I INVESTOR Money Works for You

"The more you play this game, the RICHER you become!"
Further info please visit <https://www.facebook.com/jbcashflowgame>

STARLIGHT 1000

千星闪耀

Made in SG

Guest
Kelvin Tee Tin Loong, MDRT UM
100尺竿头，更进一步

Guest
Heng Jing Thin, MDRT LIA
100就是那么Young

全民100

TIME : 8PM- 9.30PM

26 FEB 2021

Emcee : Sylvia Lee Ern Shin, LIA

YouTube LIVE

host by SG Marketing Department

Numerous Interesting Learning Activities



03.

PART THREE

Place Visited



03. Place Visited



Great Eastern office (JB Branch)



Great Eastern office (JB Branch)



Great Eastern office (JB Branch)



Great Eastern office (JB Branch)

03. Place Visited



SG Agency office (Johor)



SG Agency office (Johor)



SG Agency office (Johor)



SG Agency office (Johor)



04.

PART FOUR

Valuable Memories



04. Valuable Memories



Take photo with my internship supervisor
Mr. Andy Lim Wee Kean (Group Sales Manager)

04. Valuable Memories



Take photo with my internship supervisor's wife
Ms. Violet Lee Yen Ping (Unit Manager)

04. Valuable Memories



Take photo with my colleagues

04. Valuable Memories



Take photo with my colleagues

05. Obtained From Internship

Job Skills

Time Management

Enhance
Inspirational
Mind

Additional
Financial
Knowledge





♥ Thank You ♥

AVA Wealth Consultancy

Given Me A Lot Of Unforgettable Internship

Learning And Experiences