

VOLUNTEERING INTERNSHIP & FINANCIAL PLANNING TRAINING

MOHD SHARIFFUDDIN BIN MOHD ARIFF

03 JULY 2017 – 04 AUGUST 2017



INTRODUCTION

- ❖ MOHD SHARIFFUDIN BIN MOHD ARIFF
- ❖ FROM BANDAR JENGKA, PAHANG
- ❖ GRADUATED FROM UNIVERSITI TEKNOLOGI MALAYSIA, SKUDAI JOHOR BAHRU
- ❖ BACHELOR OF MECHANICAL ENGINEERING AUTOMOTIVE

ITINERARY



WEEK	PROGRAMME
1	○ Official self introduction session ○ Weekly meeting (sharing session, Q&A) ○ Seminar ‘ Built Your Career in Financial Planning Industry’ ○ Risk management technique ○ R&F Puteri Cove, Danga Bay and Mahkota Sultan visit. ○ Cashflow game in SG Taman Universiti, Skudai
2	○ Product learning session (Protection Planning on TPD, Income Replacement, Family Security, Medical) ○ Debt cancellation planning ○ Saving and Investment Planning ○ Weekly meeting (Sharing with senior agent) ○ Relationship account ‘ Liability Employee’ vs ‘Assets Employee’ ○ Sight seeing learning trips : Forest City, Kota Iskandar, Puteri Harbour, Legoland.

ITINERARY

WEEK	PROGRAMME
3	○ Sales cycle : Relax, Disturb, release, close ○ Weekly meeting (Q&A session) ○ Getbis & eSubmission ○ Claim experienced and mission to be a good agent ○ Role play, comprehensive takaful ○ MLTA vs MRTA concept, OCBC loan referral program ○ Movie treat : Inception
4	○ Business entities and potential risk ○ Trust Insurance and business succession trust and private trust ○ Keyman Liability Cancellation program ○ UTM direct approach ○ General Insurance ○ Visit KL Great Eastern HQ, PJ Icon City and Melaka ○ Farewell buffet lunch at Double Tree by Hilton Hotel JB ○ NLP- Master of Destiny

SHARING SESSION

- ❖ Mr. Joseph Wong Choong Wah share about how he did to approach on the stranger market, especially in UTM. He using his capability and confident in himself to knock up every single lecturer room in UTM. He advice, we do not need to fear as long as we do the good and right thing.
- ❖ Mr. Andy Lim Wee Kian sharing about how he survive in this industries. He start when he was studying in UTM in Civil Engineering. He have a good principal and discipline, to change their live way from moderate guy to successful guy. There is no easy way to success, except hard work and consistency do what we love in life.
- ❖ Madam Violet shared how she start on this line. From do know nothing, until she know everything. Always use good soft skill and sweet smile to tackle the client. Try to disturb with any accident and incident nowadays, related to death, critical illness and retirement fund.
- ❖ Mrs. Tee May Chee shared about how we should do when faced with the stranger person. Approach step by step, do not need to rush, just relax and fact find. Make our future client easy and comfortable with us, then try to approach with good communication and reasonable policies suit with their budget and needed.

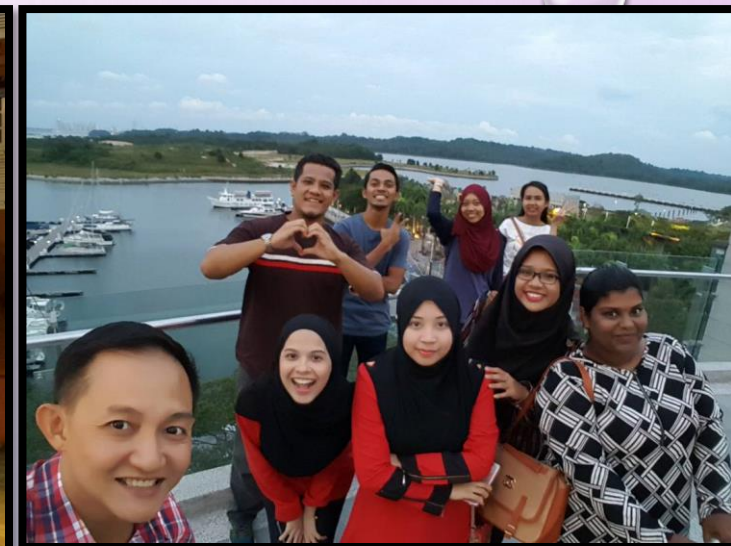
CASH FLOW GAMES IN SG TMN UNIVERSITY



MILION DOLLAR ROUND TABLE (MDRT) TALK



SIGHT SEEING, VISIT NEW PLACE



GREAT EASTERN TOWER IN KUALA LUMPUR



NEW BUDDIES, NEW SPIRIT



Why must join GREAT EASTERN Takaful?

- ❖ **Established company in malaysia.**
- ❖ **A plan for life long financial.**
- ❖ **A plan for our self and the loves ones.**
- ❖ **Great support when is needed.**
- ❖ **Great advice because we care.**
- ❖ **Don't waste your life, because life is great.**



APPRECIATION

- ❑ Special thanks to Mr. Andy and the teams, giving me opportunity to join this training in this industry. It's worthy to learn and gained knowledge in one month.
- ❑ Such a great hospitality and accommodation, and enjoy with other mates and new environment with the sight seeing programmed.
- ❑ So much positive value added in this course, about financial and future description. What's we are doing today, it's make who we are next 20 years.
- ❑ "Change your focus, from making money to serving more people. Serving **more** people makes the money come in". - Robert Kiyosaki