

Strategic Portfolio Design with **PRS**



A practical workshop for financial professionals to strengthen retirement planning conversations, design more suitable PRS portfolios, and apply tools and frameworks with greater confidence.

26 November 2026

9:00AM – 5:00PM

FPAM Office
Phileo Damansara 1

Why Attend? Learn How To:

-  identify clients' retirement gaps;
-  position PRS as part of a retirement strategy;
-  use PPA's PRS Retirement Calculator;
-  evaluate PRS funds more effectively; and
-  present PRS solutions with greater confidence.

Obtain
**PRS Specialist
Certification**
Upon Completion

Who Should Attend

- Financial planners
- Wealth advisers
- PRS & Unit trust consultants
- Insurance and takaful professionals
- Relationship managers
- Other financial services practitioners.

Program Highlights

1. Retirement gap analysis and client diagnostics;
2. PRS portfolio design principles and retirement positioning;
3. Use of PPA's PRS Retirement Calculator;
4. PRS fund evaluation and portfolio selection;
5. Case simulations and real-world client conversations and improving PRS adoption.

Registration Details

EARLY BIRD
RM400

ends 13.11.2026

NORMAL FEE: RM500

**GROUP
REGISTRATION**
RM380 /per pax

Group of 6 and above

EARN POINTS 10 FPAM CE | 10 SIDC CPE | 8 FiMM CPD

Scan to **Register NOW**



For more
information,
contact

03-7954 9500 / 6500
yjlee@fpam.org.my

Workshop Content

The programme is structured into four practical modules that bring together strategy, technical application and advisory practice.

Module 1:

Strategic PRS Portfolio Design

Explore the retirement gap challenge and understand how PRS can be positioned as part of a structured retirement solution. Explore key features of PRS, sub-accounts, the Default Option, nomination and decumulation considerations.

Module 2:

Interactive Calculator Lab

Gain hands-on exposure to PPA's PRS Retirement Calculator and learn how to conduct retirement gap analysis, assess inflation impact, project contribution needs and discuss tax relief planning more effectively.

Module 3:

PRS Fund Evaluation Framework

Learn how to assess PRS funds using PPA's evaluation framework, with emphasis on long-term sustainability, drawdown protection, risk-adjusted thinking and portfolio construction through a core-satellite approach.

Module 4:

Practice and Case Simulations

Apply the concepts through case studies and simulated client conversations, including presenting PRS solutions, responding to common objections, positioning PRS for different life stages and identifying opportunities in employer-based discussions.



Mr Alvin Kwan

CFP · MFinPlan

BCom (Finance and Marketing)

Director, Licensed Fund Manager and Licensed Financial Planner, Redvest Wealth & Asset Management Sdn Bhd

Alvin Kwan is the Director, Licensed Fund Manager, and Financial Planner at Redvest Wealth & Asset Management. A CFP professional, he has also served as a continuing education facilitator with FPAM since 2018. With extensive experience in retirement and children's education planning, Alvin integrates his portfolio management expertise with holistic financial planning to deliver comprehensive, client-focused solutions.



Ms Kelly Wong

CFP · IFP · LFP · FAR · IFAR

Chief Executive Officer, Alpine Advisory Sdn Bhd

Kelly Wong is Chief Executive Officer of Alpine Advisory Sdn Bhd with 23 years of experience in the financial services industry, serving around 400 clients. An award-winning financial planner, she was named Malaysian Financial Planner of the Year in 2018, received a top PRS sales award from iFAST in 2026, and is a recognised speaker, panellist and mentor in the industry.



En. Rav Alfie Ropee Adman

Head of Business Solutions, PPA Malaysia

Rav Alfie Ropee Adman is Head of Business Solutions at PPA Malaysia, with 16 years of experience across biotechnology and financial services. Formerly with SIDC, he led educational programme development for capital market professionals. He holds a business degree from La Trobe University and professional certifications including CTP, PRINCE2 and Shariah RFP.