



DIVERSIFIED WEALTH INVESTMENT PLANNING

Customer Name: _____ Contact Phone No: _____

Email Address: _____ Company Name: _____

Please select the best **CHOICE(s)** advisory services for your “**Diversified Wealth Investment Planning**” to meet your retirement goals and objectives in mid to long term passive income.

(a) INVESTMENT IN SHORT TERM TO LONG TERM PORTFOLIOS (LOCAL & GLOBAL)

1. Phillip Managed Account for Retirement (PMART via EPF Fund Acc 1) : _____
2. Phillip Managed Account (PMA on CASH term) - Local Equities : _____
3. Phillip Global Wrap Account (PGWA - PPM) – HK, China, Thai, Spore, Japan : _____
4. Phillip Global Wrap Account (Foreign) – Global Bonds and Equities Mutual : _____
5. Phillip Master Money Market Fund (PMMMF) – Local Money Market : _____
6. Phillip Mutual Funds (PMF) – 300 Unit Local Trust Funds & Global Funds : _____
7. Private Retirement Saving Fund (PRSF) – Local Private Pension Fund : _____
8. Phillip Futures – KLSE index, Gold index, Commodities and Global markets : _____

(b) SAVINGS AND PROTECTION PLANS IN MID TERM TO LONG TERM PORTFOLIOS

1. Life Endowment & Term Savings Plan - Education & Retirement : _____
2. Life Insurance Investment Linked Savings Plan – Education & Retirement : _____
3. Life Medical Insurance Plan – Health Medical Services : _____
4. Life Critical Illnesses & Total Permanent Disability Plans : _____
5. General Insurance Plans – Fire, Household, Motor, MRTA, MRTL. : _____
6. Investor Trusts – Global Investment Funds & Insurance Saving Plans : _____

(c) PROPERTY INVESTMENT & FINANCING+RISK MANAGEMENT & ESTATE PLANNING

1. Real Estate & Properties – Buy, Sale & Rental Services (CyberJaya) : _____
2. Mortgage Financing & Corporate Risk Recovery Management : _____
3. Estate Planning – RHB Trustee Management (Will & Trust) : _____



Certified Financial Planner: C001598

Mr. ALWIN YAU MIN SIN,

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MBA (Finance) Hull UK, CFP, CMSRL, C.Dip AF (ACCA)

PHILLIP WEALTH PLANNERS SDN BHD

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