

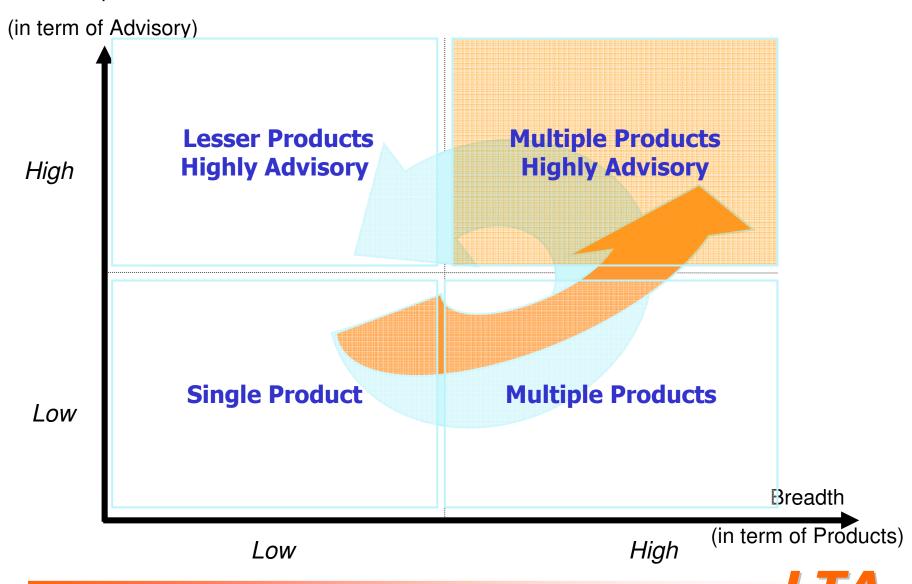
Successful Advisory Practices -- The Blue Ocean Strategy By KP Thum

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Depth Choice - Depth & Breadth



Differences & Challenges

(in term of Advisory)

High

Low

Lesser Products Highly Advisory

- · Customer financial goals
 - Professional practice
 - · Fee & Commission
 - Process based

Multiple Products Highly Advisory

- · Customer financial goals
 - · Professional practice
 - · Fee & Commission
 - Process based
 - Multiple choices
- 1-stop financial services

Single Product

- Sales focused
- Agency Structured
 - Commission
- Transaction based
 - Single carrier

Multiple Products

- Sales focused
- Agency Structured
 - Commission
- Transaction based
 - Multiple carriers
- Multiple products/services

Breadth

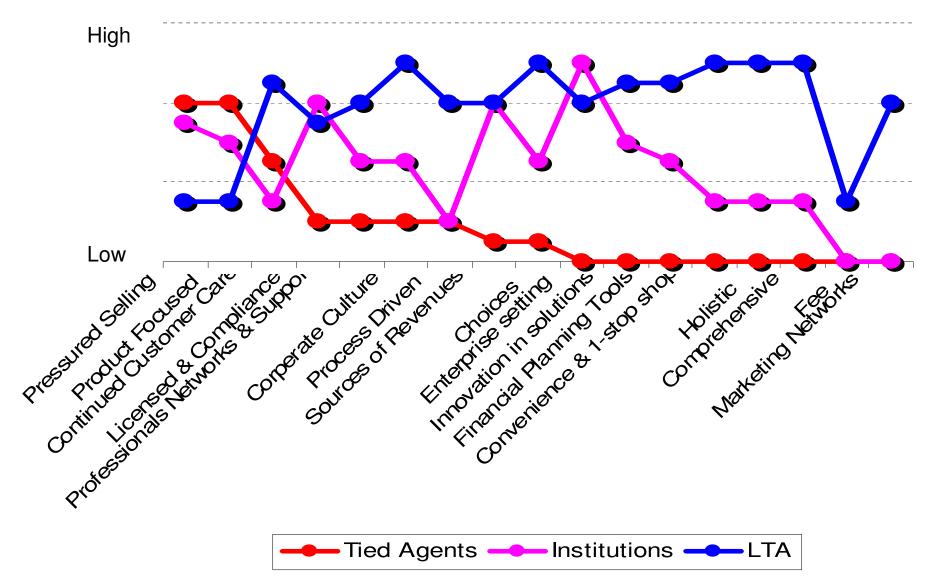
Low

High

(in term of Products)



Blue Ocean Strategy Canvass LTA Bhd





OUR VALUE

GRATITUTE, GIVING & GROUP UNITY

感恩,奉献,团队

OUR MOTTO

TOGETHER WE PROGRESS

OUR MISSION

Establishing entrepreneur network sharing common beliefs and values (Gratitude, Giving, Group Unity) via Financial Integrated Services. To add value to people's lives by creating wealth for every one to share and enjoy.

通过财务综合服务,营造一个拥有精神价值观(感恩,奉献,团队)的企业网络.创造价值,造福人群,共存共荣,共享成果.

OUR VISION

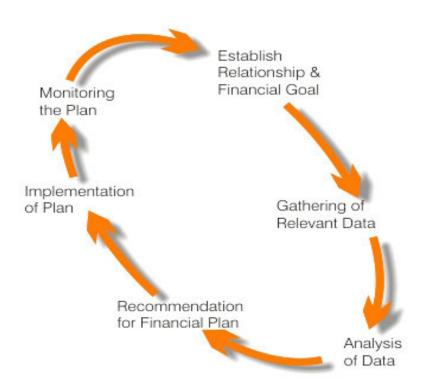
The Preferred One-Stop Financial Planning & Networking Corporation in Malaysia and Beyond.

成为马来西亚与国际首选一站式财务规划及企业网络



Our Approach

Process-driven & client-focused



In order to achieve the financial goals while exploring into the six-step financial planning process, writing the Financial Plan is the corner stone to a success of the total holistic financial planning.

Holistic Approach To Your Wealth



Wealth Conservation (WC)

(focus on conserving wealth through tax planning and cash flow management)





A Complete Puzzle Of Your Life Financial Planning





Lion Team Advisors Bhd

Lion Wealth Advisors Sdn Bhd

- -Financial Planer (IA) licensed by SC.
- -Area: Financial Planning, Tax Planning, Biz Succession Planning.
- Lion Protection
 Advisors Sdn Bhd
- -Financial Advisor licensed by BNM.
- -Area: Insurance Planning

- Lion Estate
 Advisors Sdn Bhd
- -Business Unit specialized in Estate Planning
- -Area: Estate Planning & Administration
- Lion i Advisors Sdn Bhd
- -Business Unit specialized in investment planning
- -Area: Unit Trust and Discretionary Accounts
- Lion Risk Advisors
 Sdn Bhd
- -Business Unit specialist in Life and General insurance (Agency development)
- -Area: Risk Management

LTA



Granges Alean Strategy

LTA

Reduce

Which factors should be reduced well below the industry's standard?

Eliminate

Which of the factors that the industry takes for granted should be eliminated?

A New Value Curve

Raise

Which factors should be raised well above the industry's standard? Create

Which factors should be *created* that the industry has never offered?

Source: Kim & Mauborgne Book Of Blue Ocean Strategy

Blue Ocean Strategy

Create uncontested market space

Make the competition irrelevant

Create and capture new demand

Break the value-cost trade-off

Align the whole system of a firm's activities in pursuit of differentiation and low cost





Thank You

The Future Begins Now!

LION TEAM ADVISORS BHD

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