



# MFPC Continuing Professional Development (CPD) Programme Endorsement Guidelines

## Objectives

The objective of the Continuing Professional Development (CPD) is to raise the standard of competency and professionalism of financial planners and advisers. This SOP is to guide CPD Training Providers to submit their programme(s) for MFPC CPD endorsement.

## Guidelines on Programme Endorsement

### 1. Professional/Educational Institution offers professional and academic programme

- 1.1 Written endorsement application shall be submitted to the MFPC Secretariat at least **60 days** prior to the actual programme date.
- 1.2 Once credit evaluation is completed and exemption is approved by the Certificate and CPD Board (CCB), the professional programme shall be listed on MFPC exemption guideline for public reference.
- 1.3 MFPC shall charge CPD endorsement fee RM1,000 on each programme application for endorsement. CPD endorsement fee is non-refundable.

### 2. Professional/Educational Institution offers CPD Programme (CPD Training Provider)

- 2.1 MFPC shall charge CPD endorsement fee **RM400** for each CPD programme application. CPD endorsement fee is non-refundable.
- 2.2 CPD Training Provider shall be a recognized Professional/Trade Association /Government Agencies/Regulatory approved Financial and Relevant Institutions.
- 2.3 CPD Training Provider must submit endorsement application to the MFPC Secretariat at least **14 days** prior to the actual programme date.
- 2.4 The CCB will process CPD endorsement only if the following required documents have been submitted to MFPC Secretariat on time:
  - I. **Objectives and learning outcomes of the programme**
  - II. **Outline of the programme**
  - III. **Speakers' profile**
  - IV. **Speakers' identification card/passport number or a copy of photo stated identification card/passport**
  - V. **Programme Fee**
- 2.5 If **MFPC logo** is used for promotional brochure; the brochure must be submitted to the MFPC for approval prior to printing of the brochure.
- 2.6 Once the programme is approved as CPD programme; it'll be uploaded onto **MFPC website** under Monthly CPD Programmes.
- 2.7 Endorsed CPD programme shall be **email blasted** to MFPC members via **monthly CPD up- dates**; usually scheduled on last day of the month.
- 2.8 CCB members and/or MFPC designated staff(s) is permitted to attend/audit endorsed programme to learn and establish quality and standard of the cpd programme from time to time.
- 2.9 In this regard, CPD endorsement is meant to provide continuous learning experience for the MFPC members only; CPD Training Provider is not allowed to use this endorsement to market personal / company products to the audience.
- 2.10 MFPC Secretariat shall write officially to the programme organizer to inform and/or to reprimand on any misconduct being observed during the conduct of CPD programme.
- 2.11 Should the CPD Training Provider request further assistance on top of CPD endorsement; MFPC Secretariat shall seek endorsement from the Vice President, External Relations & Publicity on collaborative methodology.



## Application Form for MFPC CPD Programme Endorsement

*You are required to complete this application form and submit relevant documents*

No.	Information & Documents required for CPD programme endorsement		
1.	Name of Programme:		
2.	Date & Venue of the Programme:		
3.	Objectives and Learning Outcomes of the Programme:		
4.	Programme Outline:		
5.	Lecturer(s)' Personal Profile & Identify Card/Passport Number or a copy of photo stated Identity Card / Passport:		
6.	Programme Fee per participant:		
7.	MFPC e-marketing services required:		
	<b>No.</b>	<b>Item</b>	<b>Rate</b>
	1.	Dedicated email blast ( <b>One Time</b> ) – Active Ordinary and Student Members	RM 100
	2.	SMS blast ( <b>One Time</b> ) – Active Ordinary Members	RM 500
	3.	SMS blast ( <b>One Time</b> ) – Ordinary and Students Members	RM 1,000
	4.	Website banner advertising and facebook advert ( <b>per month</b> )	RM 100
	5.	Website Main Banner advertising and facebook advert ( <b>per month</b> )	RM 200
		<b>Total Fee</b> (Pls state if applicable)	<b>RM</b>
8.	<b>Person-in-charge of the Programme &amp; correspondence details:</b>		
	Name: _____ Position : _____		
	Contact Details : _____ Email : _____		
	Correspondence Address : _____		
9.	<b>Fee is payable to:</b>		
	I enclose a company cheque made payable to <b>“Malaysian Financial Planning Council”</b> for		
	1. Programme Endorsement Fee <u>RM 400</u>		
	2. e-Marketing Services Fees <u>RM _____</u> (if applicable)		