

قَالَتْ إِحْدَاهُمَا يَا أَبَتِ اسْتَأْجِرْهُ <sup>صَلِّ</sup> إِنَّ خَيْرَ مَنْ اسْتَأْجَرْتَ الْقَوِيُّ الْأَمِينُ

# My Profile



Suzardi Bin Maulan (Pakdi)  
[www.pakdi.net](http://www.pakdi.net)

## Certification

Islamic Financial Planner (IFP)

## License

1. Capital Markets Services Representative Licence holders for Financial Planning - Securities Commission Malaysia
2. Financial Adviser Representative – Bank Negara Malaysia

## Principal Company

Phillip Wealth Planners Sdn Bhd

# A Little Bit On History

- 1983: Establishment of Bank Islam
- 1984: Establishment of Syarikat Takaful Malaysia Berhad
- 1993: First Islamic equity unit trust fund Tabung Ittikal Arab-Malaysian
- 1994: Establishment of BIMB Securities Sdn Bhd
- 1996: Establishment of Shariah Advisory Council (SAC) of SC
- 2004: Introduction of investment advisor license by SC
- 2008: Islamic Financial Planner (IFP) & Shariah Registered Financial Planner (Shariah RFP)

# Talent In Wealth Planning

CMSRL: 831

FAR: 765

Fiduciary duty – represent client, put client's interest first

# Key Challenges

1. Operational issues in becoming 100% **independent** wealth planner ie. (qawiy & amin)
2. How far fintech could facilitate **transformation** from salesman approach to advisory practice?
3. The **readiness** of the Shariah advisors, lawyers, judges, lawmakers, regulators to provide Islamic solutions:
  - Global [investment](#)
  - Federal vs state power
  - Shariah advisor fatwa vs court decision

# Thank You



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# Malaysian Capital Market

- Equities (689)
- Bond & sukuk
  - Exchange Traded Bond & Sukuk (4)
- Fund Management
- Derivatives
- Structured products

# Fund Management

## Listed

- Exchange Traded Fund (6)
- Real Estate Investment Trust (4)
- Closed End Fund (0)

## Unlisted

- Unit trust (229)
- Wholesale fund (73)\*
- PRS (25)\*
- Asean Collective Scheme \*\*