



MFPC Continuing Professional Development (CPD) Programme / Study Material Endorsement Guidelines

Objective

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/Authors to submit their programme/book(s) for MFPC CPD endorsement.

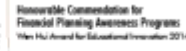
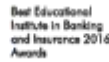
Guidelines on Programme Endorsement Objective

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) / Study Material

- 2.1 MFPC shall charge CPD endorsement fee **RM300** (Corporate Members) and **RM600** (Non-Corporate Members).
- 2.2 The endorsement fee is chargeable for each CPD programme/book application; and fee is non-refundable.
- 2.3 CPD Training Provider shall be a recognized Professional/Trade Association /Government Agencies/Regulatory approved Financial and Relevant Institutions.
- 2.4 CPD Training Provider must submit endorsement application to the MFPC Secretariat at least **14 days** prior to the actual programme date.
- 2.5 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 / Content**
 - III. **Speakers' profile / Author**
 - IV. **Speakers' / Author identification card/passport number or a copy of photo stated identification card/passport**
 - V. **Programme Fee / Price**
- 2.6 If **MFPC logo** is used for promotional brochure/book cover; the brochure/book cover must be submitted to the MFPC for approval prior to printing of the brochure.
- 2.7 Once the programme/book is approved with CPD hours; it'll be uploaded onto **MFPC website** for reference.
- 2.8 Endorsed reading material with proof of purchase or yearly subscription is entitled for 5 cpd hours.
- 2.9 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.
- 2.10 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.
- 2.11 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.
- 2.12 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.
- 2.13 At all times, Training provider/ Author / Speaker shall observe and comply to the MFPC Professional Conduct of Speakers/Lecturers.



MFPC PROFESSIONAL CONDUCT of SPEAKERS/LECTURERS

(Up-dated 2 Jan 2020)

1. Always to be ambassador of the MFPC.
2. To demonstrate professionalism and impartiality during the workshop/class presentation. Speaker shall not promote or criticize any company in specific. No personal or company product is to be promoted during the workshop/class.
3. Staff/agent poaching and recruiting activities are prohibited.
4. Punctual and to demonstrate effective time management.
5. To observe and follow the programme outline/content of the programme; and cover the full syllabus of the workshop/class on time.
6. To enhance presentation performance by quoting real life experiences or current development and circumstances in the market.
7. To bring along soft copy (CD or pen drive) of the workshop/class presentation slides. Speaker is allowed to project additional slides as extra or separate notes for further clarification and detailed explanation to the participants.
8. Speaker is required to review and up-date the presentation slides if slides are provided by the MFPC. Should amendments be made; Speaker is required to notify the MFPC secretariat; and provide the amended version to the secretariat prior to workshop/class.
9. Speaker to consent printing and/or upload of presentation slides for participants' reference; if the slides are prepared and/or developed by the Speaker.
10. The MFPC own the copy right of the presentation slides where slides are provided by the MFPC.
11. Only MFPC's logo and RFP/Shariah RFP logo are allowed to be printed on slides. Speaker's own company logo is NOT allowed to be printed on all slides.
12. Speaker should introduce himself/herself to the participants at the beginning of the workshop/class; Speaker is allowed to distribute name card to the participants when deem necessary.
13. MFPC Secretariat is responsible for appointment and replacement of Speaker.
14. A token of appreciation and/or contribution/voluntary service shall be consented between MFPC and Speakers/Lecturers prior to engagement of speaking assignment(s).
15. MFPC reserves the right to revise the Professional Conduct of Speakers/Lecturers from time to time.

Notes: Please be informed that MFPC is commonly conducting financial planning Workshops free-of-charge to undergraduates and public at large; especially to the B40 groups. Your support and contribution to promote financial literacy programmes to the nation is highly appreciated.

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Application Form for MFPC CPD Programme/Study Material Endorsement

You are required to complete this application form and submit relevant documents to the MFPC secretariat

No.	Information & Documents required for CPD programme/study material endorsement																												
1.	Name of Programme/Title Book & Publisher																												
2.	Date & Venue of the Programme:																												
3.	Objectives and Learning Outcomes of the Programme/Book:																												
4.	Programme /Book Outline:																												
5.	Lecturer(s)/ Author Name & Identify Card/Passport Number or a copy of photo stated Identity Card/Passport:																												
6.	Programme Fee per participant/Book Price:																												
7.	MFPC e-marketing services required: <table border="1"> <thead> <tr> <th>No.</th><th>Item</th><th>Rate</th><th>Tick</th></tr> </thead> <tbody> <tr> <td>1.</td><td>Dedicated email blast (One Time) – Active Ordinary and Student Members</td><td>RM 100</td><td></td></tr> <tr> <td>2.</td><td>SMS blast (One Time) – Active Ordinary Members</td><td>RM 500</td><td></td></tr> <tr> <td>3.</td><td>SMS blast (One Time) – Ordinary and Students Members</td><td>RM 1,000</td><td></td></tr> <tr> <td>4.</td><td>Website banner advertising and facebook advert (per month)</td><td>RM 100</td><td></td></tr> <tr> <td>5.</td><td>Website Main Banner advertising and facebook advert (per month)</td><td>RM 200</td><td></td></tr> <tr> <td></td><td>Total Fee (Pls state if applicable)</td><td>RM</td><td></td></tr> </tbody> </table>	No.	Item	Rate	Tick	1.	Dedicated email blast (One Time) – Active Ordinary and Student Members	RM 100		2.	SMS blast (One Time) – Active Ordinary Members	RM 500		3.	SMS blast (One Time) – Ordinary and Students Members	RM 1,000		4.	Website banner advertising and facebook advert (per month)	RM 100		5.	Website Main Banner advertising and facebook advert (per month)	RM 200			Total Fee (Pls state if applicable)	RM	
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8.	Person-in-Charge of the Programme/Book & Correspondence Details: Name: _____ Position : _____ Contact Details : _____ Email : _____ Correspondence Address : _____																												
9.	Fee Payable I enclosed hereby payment receipt made payable to “Malaysian Financial Planning Council” for 1. Programme/Reading Material Endorsement Fee <u>RM 600</u> 2. e-Marketing Services Fees <u>RM</u> _____ (if applicable) Thank you.																												