



Malaysian Financial Planning Council
(Reg. No: 0402-04-5)
(Incorporated Under Societies Act 1966)



CMDF GRANT AGREEMENT 2023

**Certification in Retirement Planning
for
Unit Trust Consultant**

INTRODUCTION

MFPC (Malaysian Financial Planning Council)

An independent professional body set up in 2004 with the objective of promoting nationwide development and enhancement of the financial planning profession in Malaysia. It provides an evolving set of Best Practice Standards and Code of Ethics that must be adhered by the Registered Financial Planner (RFP) and Shariah RFP designees in ensuring the public is served with the highest quality of financial planning services

CMDF GRANT (Capital Market Development Fund)

A joint action plan (JAP) spearheaded by Securities Commission Malaysia (SC) aims to elevate the financial planning industry especially in the field of retirement planning, to equip unit trust consultants with timely updates on industry development and to empower standards in their services to the public

OBJECTIVE

1. To create awareness on the importance of retirement planning in Malaysia
2. To equip unit trust consultant with relevant industry knowledge and skills on retirement planning
3. To prepare unit trust consultant in providing more comprehensive retirement advisory services to the public
4. To widen the network of unit trust consultant with individuals of the same interest nationwide
5. To strengthen credential of unit trust consultant by acquiring an associate RFP / Shariah RFP professional designation

SCOPE OF LEARNING

Choose one (1) only:

Option 1: RFP Programme

- Module 1: Fundamentals of Financial Planning
- Module 6: Retirement Planning

Option 2: Shariah RFP Programme

- Module 1: Fundamentals of Shariah Financial Planning
- Module 6: Retirement Planning

GRANT STRUCTURE

1. 50 candidates per intake per option on first-come-first-serve basis
2. ONE-TIME grant amounting to a maximum of RM2,500/=
3. Candidate is required to complete the chosen option (see Scope of Learning) within one (1) year
4. Assessment performance will be reported to SC
5. Candidate is awarded Associate RFP / Shariah RFP status upon completion
6. Candidate is required to pay a revoked fee of RM2,500/= if the chosen programme is not being completed within the required timeframe

PROGRAMME STRUCTURE

Candidate is required to:

1. attend SIX (6) days of virtual classes guided by a certified MFPC trainer
2. achieve a minimum of 80% class attendance
3. score a “pass” in required assessments

INTAKE

1. June 2023
 - Class Date:
 - RFP Module 1: 06, 07 and 08 June 2023
 - RFP Module 6: 13, 14 and 15 June 2023
 - Assessment date:
 - RFP Module 1: 09 June 2023
 - RFP Module 6: 16 June 2023
 - Registration start date:
 - 15 March 2023
 - Registration end date:
 - 19 May 2023
2. October 2023
 - Class Date:
 - RFP Module 1: 03, 04 and 05 October 2023
 - RFP Module 6: 10, 11 and 12 October 2023
 - Assessment date:
 - RFP Module 1: 06 October 2023
 - RFP Module 6: 13 October 2023
 - Registration start date:
 - 31 July 2023
 - Registration end date:
 - 15 September 2023

ASSESSMENT

1. Format: 50 multiple-choice questions; closed-book
2. Duration: 1 hour and 15 minutes
3. TWO (2) devices are required: desktop computer, laptop or mobile phone
4. Candidate who scores a “non-pass” must attend a resit assessment till a “pass” grade is obtained; the “pass” grade must be obtained within one (1) year from the first registration date; a self-paid fee of RM100/= is imposed per resit
5. Grading Scheme:

RFP / Shariah RFP Module 1 and Module 6		
DISTINCTION	PASS	NON-PASS
80% to 100%	50% to 79%	0% to 49%

ENTRY REQUIREMENT

1. Minimum SPM academic qualification or its equivalent
2. Minimum 3 years of working experience in the financial services / relevant industry
3. A non-refundable commitment fee of RM150

REGISTRATION

1. Understand the relevant information pertaining to Certification in Retirement Planning funded by CMDP at <https://www.mfpc.org.my/retirement/>
2. Download the "Declaration of Agreement 2023", complete and sign (only original signature is accepted)
3. Required documents / items for registration:
 - Passport size photo
 - IC (front and back)
 - SPM academic certificate or its equivalent
 - Updated resume/CV
 - Scanned copy of the completed and signed "Declaration of Agreement 2023"
4. Complete the online registration at <https://1st.mfpc.org.my/> (refer to registration guideline and video tutorial)
5. Incomplete or late application will not be accepted
6. Successful candidate will be notified by MFPC
7. Deferment or withdrawal is not permitted once approval is granted
8. Existing member must ensure the membership status is active before proceed to registration

FOR ASSISTANCE

Noor Jawahir Binti Ismail (Wawa) | Wan Nur Aishah Binti Wan Asmadi (Aishah)

Education and Examination Department (EED)

Telephone: 03-62035899

Email: wawa@mfpc.org.my | aishah@mfpc.org.my