MFPC
Malaysian Financial Planning Council
Competence.Ethics.Standards

CMDF
Dana Pembangunan Pasaran Modal
Capital Market Development Fund

15 MFPC CPD
16 FIMM CPD

SPECIAL INTAKE
CERTIFICATION IN RETIREMENT PLANNING 2023

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 (Capital Market Development Fund) Scholarship

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, capital market practitioners and financial services practitioners with timely updates on industry development and to empower standards in their services to the public

OBJECTIVES

- To create awareness on the importance of retirement planning in Malaysia
- To equip financial practitioners with relevant industry knowledge and skills on retirement planning

AREA COVERED

RFP Programme	
Module 1	Fundamentals of Financial Planning
Module 6	Retirement Planning

SELECTION CRITERIA

- Minimum **SPM** academic qualification or its equivalent
- Minimum **3 years of working experience** in the financial services industry

PROGRAMME STRUCTURE

Duration	3 days - RFP Module 1 | 3 days - RFP Module 6
Mode	Online (Microsoft Teams)
Commitment Fee	~~RM150 (non-refundable)~~ *Commitment Fee is Waived* Total Programme Fee: RM2,500 (fully funded by CMDF-MFPC)
Assessment	To be completed in class

2023 INTAKE

Registration Closing Date	Class Date
5 November 2023	28, 29, 30 November and 5, 6 and 7 December 2023

Programme Information
https://www.mfpc.org.my/retirement

TALK TO US
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COURSE OUTLINE

RFP Module 1

- Financial Planning Environment, Phenomenon and Process
- The Regulatory Environment for Financial Planners
- Ethics and Professionalism
- Personal Financial Statements
- Cash Flow Management
- Time Value of Money
- The Economic Environment and its Impact on Financial Planning
- Risk Tolerance
- Investment Planning
- Tax Planning
- Risk Management and Life Insurance Planning
- Estate Planning Issues, Process Personalities and Instruments
- Retirement Planning Tools and Processes

RFP Module 6

- An Overview of Retirement Issues
- The Retirement Planning Process
- Approaches for Determining the Required Retirement Capital
- "Risk" and "Risk Profiling" in Retirement Planning
- Analyzing Investment Risk and its Application
- Investment Basics and Strategies in Retirement Planning
- Construction and Management of Retirement Portfolio
- Strategy to meet Shotfalls in Retirement Capital
- Reitement Schemes for Individuals
- Retirement Planning Issues in Entrepreneurs and Small Business
- Managing Consumption Credits in Retirement Planning
- Debt Management in Retirement Planning