EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1 Fund. of FP	Module 2 Risk Mgt/Ins.P	Module 3 Inv. Planning	Module 4 Tax Planning	Module 5 Est. Planning	Module 6 Ret. Planning
Financial Planning**						
FChFP – Fellow, Chartered Financial Practitioner	☑	☑	☑	☑	☑	☑
ChFC – Chartered Financial Consultant	☑	☑	☑	☑	☑	☑
EFP – European Financial Planner	☑	☑	☑		☑	☑
Dip.FP(MII) – Diploma in Financial Planning	☑	☑	☑	☑	☑	
CFP – Certified Financial Planner	☑	☑	☑	☑	☑	☑
RFC – Registered Financial Consultant	**No exemption**					
***All Professional Financial Planning Programme – will be granted for maximum 6 modules*						
Insurance (Home Office/Actuarial)						
FIA – Fellow, Institute of Actuaries (UK)	☑	☑	☑			☑
FSA – Fellow, Society of Actuaries (US)	☑	☑	☑			☑
AAII – Associate Australia Insurance Institution		☑				
FAII – Fellow, Australia Insurance Institution		☑				
NZIIF - New Zealand Insurance Institution(Sr.Assoc)/Fellow		☑	(Fellow only)			
ACII/FCII – Associateship / Fellowship Chartered Insurance Institute		☑	☑			
AMII/FMII – Associateship/Fellowship of The Malaysian Insurance Institute		☑	☑			
Insurance (Field/planners/Life Agency)						
ChLP – Chartered Life Practitioner	☑	☑				☑
CLU – Chartered Life Underwriting	☑	☑				☑
LUTCF – Fellow, Life Underwriter Training Council		☑				
FCLP – Fellow Certified Life Practitioner (LP101, LP102, LP103 & LP104)		☑		☑		
FLMI – Fellow, Life Management Institute			☑			
CLPM – Certified Life Planner & Marketer (LP102 & LP102)		☑				
ChIFP – Chartered Investment and Finance Practitioner	☑		☑			☑
CFA – Chartered Financial Analyst			☑			☑

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
	Fund. of FP	Risk Mgt/Ins.P	Inv. Planning	Tax Planning	Est. Planning	Ret. Planning
Accounting Designations						
MIA – Malaysian Institute of Accountants			☑	☑		
ACCA – Association of Certified and Chartered Accountants			☑	☑		
CIMA – Chartered Institute of Management Accountants			☑	☑		
CPA Australia – Certified Practice Accountant Australia			☑	☑		
MICPA – Malaysian Institute of Certified Public Accountants			☑	☑		
NIA – National Institute of Accountants			☑			
AIA – Association of International Accountants			☑			
Banking						
AIB - Academy of International Business (Personal Banking)			☑			
PKMC – Pasaran Kewangan and Malaysia Certificate			☑			
DBFS – Diploma in Banking and Financial Services (pass Treasury & Investment)			☑			
DBF – Diploma in Banking and Finance (pass Financial Management)			☑			
Secretarial & Admin						
ICSA – Institute of Chartered Secretaries and Administrators			☑	☑		
MACS – Malaysian Association of Companies Secretaries			☑			
AACS – Annual Approved Company Secretaries			☑			
Legal						
LLB (Local) - Bachelor of Legal Letters				☑		
Marketing & Sales						
CFMC – Certified Financial Marketing Consultant (effective 2005)	☑	☑			☑	☑

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
	Fund. of FP	Risk Mgt/Ins.P	Inv. Planning	Tax Planning	Est. Planning	Ret. Planning
Bursa Malaysia Derivatives Bhd (BURSA)						
SC Licensing Examination						
Module 7 - Financial Statement Analysis and Asset Valuation + Module 10 - Asset and Funds Management			☑			
Corporate						
Great Eastern Life Assurance (Malaysia) Berhad - Life Planning Advisors (LPA) Programme		☑			☑	
AIA Bhd - AIA Certified FinCoach Program	☑	☑				
Zurich Life Insurance Malaysia - Zurich RFP Module 2		☑			☑	
Hong Leong Assurance Berhad - HLA RFP Module 2 Internal Exemption Training Program		☑				
Tokio Marine Life Insurance - Life Advisor Program (LAP 1, LAP 2, LAP 3)		☑				
Prudential Assurance Malaysia Berhad		☑				

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1 Fund. of FP	Module 2 Risk Mgt/Ins.P	Module 3 Inv. Planning	Module 4 Tax Planning	Module 5 Est. Planning	Module 6 Ret. Planning
Help University						
Bachelor of Business (Finance) (Hons)						
– Personal Financial Planning in Malaysia (MPU3353)	☑					
– Financial Management FIN202			☑			
– Investment Analysis & Decision Making FIN204			☑			
– Wealth Management FIN205			☑			
– Analysis of Equity & Fixed Income Investments FIN302			☑			
– Global Financial Management FIN304			☑			
– Portfolio Management FIN307						
INTI International University, Nilai						
Bachelor of Financial Planning (Hons.) – (17th September 2009)	☑	☑	☑	☑	☑	☑
INTI International College, Penang						
Diploma in Finance – (June 2015)						
Finance Principle FIN1150 (DIF) (2)			☑			
Financial Management FIN2150 (DIF)			☑			
Financial Market FIN2152 (DIF)			☑			
Business Studies						
Multimedia University (MMU)						
B. Accountancy (Hons.) – (4th May 2007)						
BBA (Hons.) Banking & Finance						
Bachelor of Law (Hons.)						
– BBF 2253 Investment			☑			
– BAC 2097 Taxation 1 & BAC 3027 Taxation 2				☑		
– BEQ 3014 Equity and Trust 1 & BEQ 3024 Equity and Trust 2					☑	
Open University Malaysia (OUM)						
Bachelor of Business Administration – (3rd September 2009)						
– BBPE4103 Estate Planning					☑	
Executive Master in Financial Planning	☑	☑	☑	☑	☑	☑

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
	Fund. of FP	Risk Mgt/Ins.P	Inv. Planning	Tax Planning	Est. Planning	Ret. Planning
Taylor's University						
Twinning prog. with University of West England (UWE) – (2nd February 2010)						
– Bachelor of Art (Hons) Accountancy & Finance			☑	☑		
Twinning prog. with University South Australia (UNISA) – (2nd February 2010)						
– Bachelor of Commerce and Bachelor of Applied Finance			☑	☑		
Bachelor of Finance and Economics (Honours)						
Bachelor of Banking and Finance (Honours)						
- BNK60404 Wealth Management	☑					
- FIN61804 Portfolio Management			☑			
Tunku Abdul Rahman University College (TAR UC) – (15th January 2009)						
Diploma in Commerce (Financial Accounting)				☑		
Diploma in Business Studies (Accounting)				☑		
Diploma in Business Studies (Finance and Investment) – (March 2012)	☑	☑	☑	☑		
Diploma in Business Studies (Banking and Finance) – (March 2012)	☑	☑	☑	☑		
Advance Diploma in Commerce (Financial Accounting)				☑		
Advance Diploma in Business Studies (Accounting)				☑		
Advance Diploma in Commerce (Business Management)				☑		
Advance Diploma in Business Studies (Finance and Investment)–(March 2012)	☑	☑	☑			
Advance Diploma in Business Studies (Banking & Finance) – (March 2012)	☑	☑	☑	☑		
Bachelor of Finance and Investment (Honours) - March 2019	☑	☑	☑	☑		
UCSI University						
Executive Master in Financial Planning and Management	☑	☑	☑	☑	☑	☑

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1 Fund. of FP	Module 2 Risk Mgt/Ins.P	Module 3 Inv. Planning	Module 4 Tax Planning	Module 5 Est. Planning	Module 6 Ret. Planning
Universiti Malaya (UM) – (8th April 2010)						
Bachelor of Economics				☑		
Bachelor of Business Administration						
– CBEB2321 Applied Financial Planning	☑					
– CBEB3301 Risk Management & Insurance		☑				
– CBEB3302 Investment			☑			
Bachelor of Finance	☑			☑		
Bachelor of Accounting	☑			☑		
Universiti Pendidikan Sultan Idris (UPSI)						
MBA programme (major in Financial Planning) – (24th July 2009)	☑	☑	☑			
Bachelors of Business Administration (Financial Services)						
- Fundamentals of Financial Planning (PFM3043)	☑					
- Insurance Planning and Takaful Planning (PBF3013)		☑				
- Investment Planning (PFM3073)			☑			
- Zakat & Tax Planning (PAT 3053)				☑		
- Estate Planning (PFM 3093)					☑	
- Retirement Planning (PFM 3083)						☑

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1 Fund. of FP	Module 2 Risk Mgt/Ins.P	Module 3 Inv. Planning	Module 4 Tax Planning	Module 5 Est. Planning	Module 6 Ret. Planning
<u>Universiti Utara Malaysia (UUM)</u>						
Faculty of Accounting & Finance – (3rd September 2009)						
Bachelor of Accounting (Hons)						
- BKAT 2013 Principle of Taxation				☑		
Bachelor of Accounting (Information System) (Hons)						
- BKAT 2013 Principle of Taxation				☑		
Bachelor of Banking (Hons)						
- BWFF 3073 Personal Finance	☑					
- BKAT 2013 Principle of Taxation				☑		
Bachelor of Finance (Hons)						
- BWFF 3073 Personal Finance	☑					
- BWRR 3033 Risk Management or BWRR 3013 Investment Analysis		☑				
- BWFN 3013 Investment Analysis			☑			
- BKAT 2013 Principle of Taxation				☑		
Bachelor of Risk Management and Insurance (Hons)						
- BWRR 3033 Risk Management or BWRR 3013 Investment Analysis		☑				
- BWFF 3073 Personal Finance	☑					
- BKAT 2013 Principle of Taxation				☑		
Bachelor of Islamic Finance and Banking (Hons)						
– BWFF 3073 Personal Finance	☑					
– BWRR 3033 Risk Management		☑				
– BWRR 1013 Risk and Insurance		☑				
– BWFN 3013 Investment Analysis			☑			
– BKAT 2013 Principle of Taxation				☑		
– BWRR 3103 Estate Planning					☑	
– BWRR 3113 Retirement Planning						☑

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
	Fund. of FP	Risk Mgt/Ins.P	Inv. Planning	Tax Planning	Est. Planning	Ret. Planning
Accounting, Finance, Business Programme						
- WFF3073 Personal Finance	☑					
- WRR 3033 Risk Management		☑				
- WRR 1013 Risk and Insurance		☑				
- WFN 3013 Investment Analysis			☑			
- KAT 2013 Principle of Taxation				☑		
- WRR 3103 Estate Planning					☑	
- WRR 3113 Retirement Planning						☑
University Malaysia Terengganu (UMT)						
Bachelor of Accounting – (31st December 2010)						
– FIN3101 Financial Management			☑			
– FIN3103 Corporate Finance			☑			
– ACC3401 Taxation 1				☑		
Bachelor of Finance with Honours						
- FNC3813 Fundamentals of Financial Planning	☑					
- FNC3823 Risk Management and Insurance Planning		☑				
- FNC3833 Investment Analysis and Portfolio Management			☑			
- FNC3843 Zakat and Tax Planning				☑		
- FNC3853 Estate Planning					☑	
- FNC4863 Retirement Planning						☑
University Putra Malaysia (UPM)						
UPM Degree Programme: Personal Financial Planning – (19th May 2011)						
– GSM5461 Financial Planning	☑					
– GSM5421 Investment Analysis			☑			
Bachelor of Consumer Studies (Finance) – (29 March 2013)						
– PSP 4308 Family Risk Management		☑				
– PSP 4309 Saving and Consumer Investment			☑			
– PSP 4307 Zakat and Individual Taxation				☑		
– PSP 3301 Household Financial Management	☑					

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1 Fund. of FP	Module 2 Risk Mgt/Ins.P	Module 3 Inv. Planning	Module 4 Tax Planning	Module 5 Est. Planning	Module 6 Ret. Planning
Degree Programme						
- GSM 5461 Financial Planning	☑					
- GSM 5421 Investment Analysis			☑			
University Tenaga National (UNITEN)						
BBA (Hons) in Finance – (13th May 2011)						
– FNNB273 Personal Financial Planning	☑					
– FNNB333 Insurance and Risk Management		☑				
– FNNB233 Investment Analysis & Strategy			☑			
University Tunku Abdul Rahman (UTAR)						
Bachelor of Accounting (Hons)						
Bachelor of Commerce (Hons) Accounting						
– UBAT2113 Taxation & UBAT3124 Advanced Taxation				☑		
– UBFF2013 Business Finance	☑					
– UBFF3013 Corporate Finance			☑			
Bachelor of Business Administration (Hons)						
– UBFF2313 Business Finance	☑		☑			
– UBFF3083 Financial Statement Analysis			☑			
– UBFF3383 Portfolio Management			☑			
– UBAT3063 Business Taxation				☑		
Bachelor of Business Administration (Hons) Banking and Finance						
– UBFF2313 Business Finance	☑		☑			
– UBAT3063 Business Taxation				☑		
– UBFB3243 Personal Financial Planning and Management	☑					
– UBFF3383 Portfolio Management			☑			
– UBFF3393 Risk Management		☑				

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1 Fund. of FP	Module 2 Risk Mgt/Ins.P	Module 3 Inv. Planning	Module 4 Tax Planning	Module 5 Est. Planning	Module 6 Ret. Planning
Bachelor of Business Administration (Hons) Risk Management						
- UBFB3243 Personal Financial Planning & Management	☑					
- UBFR3013 Principles of Risk Management & Insurance		☑				
- UBFF3383 Portfolio Management			☑			
- UBAT3063 Business Taxation				☑		
Bachelor of Business Administration (Hons) Entrepreneurship						
- UBFB 3243 Personal Financial Planning and Management	☑					
Bachelor of Marketing (Hons)						
– UBFF2313 Business Finance	☑		☑			
Bachelor of Economics (Hons) Financial Economics						
– UBFF2013 Business Finance	☑		☑			
– UBFB3143 Personal Financial Planning and Management	☑					
– UBFF3293 Risk Management		☑				
Bachelor of Economics (Hons) Global Economics			☑			
Bachelor of International Business (Hons)			☑			
Bachelor of Finance (Hons)						
– UBFF2083 Financial Management			☑			
– UBFB3843 Personal Financial Planning and Management	☑					
– UBFF3713 Corporate Finance			☑			
– UBFF3783 Financial Statement Analysis			☑			
– UBFF3993 Risk Management		☑				
– UBAT3013 Business Taxation				☑		
– UBFF3983 Portfolio Management			☑			
Master Of Business Administration (Corporate Management)						
– MBFC17204 Financial Planning	☑					
– MBBC16103 Corporate Management and Strategy				☑		
– MBFC17003 Investment Planning			☑			
– MBFC17103 Risk Management and Insurance Planning		☑				
Faculty of Business and Finance						
– UBFF2313 Business Finance	☑		☑			
– UBFF3983 Portfolio Management			☑			
– UBFF3783 Financial Statement Analysis			☑			

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
	Fund. of FP	Risk Mgt/Ins.P	Inv. Planning	Tax Planning	Est. Planning	Ret. Planning
– UBFF3253 Investment Analysis			☑			
– UBAT3013 Business Taxation				☑		
– UBAT2014 Taxation & UBAT3024 Advanced Taxation				☑		
– UBFB3843 Personal Financial Planning and Management	☑					
– UBFF3993 Risk Management		☑				
– UBFF3713 Corporate Finance			☑			
– UKFF3013 Corporate Finance				☑		
– UBFF3093 Futures and Options Analysis						
– USCC1152 Managing Personal Finance						
– UKAT2023 Taxation I				☑		

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
	Fund. of FP	Risk Mgt/Ins.P	Inv. Planning	Tax Planning	Est. Planning	Ret. Planning
– UKAT3033 Taxation II				☑		
– UKAT3043 Taxation III				☑		
– UKFF1023 Financial Management Fundamentals				☑		
– UKFB3053 Financial Markets and Regulations			☑			
– UKFF2083 Financial Management			☑			
– UKFF4024 Multinational Finance			☑			
– UKEA3053 International Finance Management			☑			
– UKFF2013 Business Finance			☑			
– UKEA2083 International Financial Institutions			☑			
– UKFF3313 Strategic Financial Management			☑			
Wawasan Open University (WOU) Malaysia						
Bachelor of Accounting						
– BAC308/05 Taxation in Malaysia				☑		
Universiti Sains Islam Malaysia (USIM)						
Bachelor of Muamalat Administration	☑	☑	☑			
Bachelor of Corporate Administration & Relation			☑	☑		
Bachelor of Marketing Financial Services	☑		☑		☑	
Bachelor of Accountacy	☑		☑	☑		
Universiti Sultan Zainal Abidin (UNISZA)						
BBA Risk Management Takaful						
- MIS 4063 Law of Insurance and Takaful		☑				
- MIS 3013 Introduction to Risk Management		☑				

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1	Module 2	Module 3	Module 4	Module 5	Module 6
	Fund. of FP	Risk Mgt/Ins.P	Inv. Planning	Tax Planning	Est. Planning	Ret. Planning
Universiti Technologi Mara (UiTM)						
Faculty of Business Management						
Bachelor of Business Administration (Hons) Insurance						
- FIN 533 Personal Financial Planning	☑					
- FIN 430 Introduction to Corporate Finance - FIN 542 International Financial Management - FIN 552 Investment and Portfoloio Analysis - FIN 420 Financial Management			☑			
Bachelor of Business Administration (Hons) Finance	☑		☑			
- FIN420 Financial Management		☑				
- FIN 533 Personal Financial Planning		☑				
- INS 452 Risk, Insurance and Takaful		☑				
- INS 535 Life and Health Insurance		☑				
- INS 536 Law of Contract and Insurance		☑				
- INS 545 Liability Insurance		☑				
- INS 648 Motor Insurance		☑				
- INS 556 Marine Insurance		☑				
Nilai University						
BA 3213 - Personal Finance	☑					
BA 3215 - Risk Management and Insurance		☑				
BA 3212 - Investments			☑			
BA 3323 - Advanced Taxation				☑		
BM 3217 - Corporate Law, Governance & Estate Planning					☑	
BA 3306 - Retirement Planning & Financial Management						☑
Asia Pacific University Of Technology & Innovation (APU)						
Bachelor in Banking & Finance (Hons) with Specialism in Financial Planning						
- Financial Planning & Control (AQ009-3-2)		☑		☑		
- Financial Management (AQ058-3-2)		☑				
- Quantitative & Statistical Method (AQ015-3-1)		☑				
- Insurance Planning (AQ081-3-3)		☑		☑		
- Introduction to Taxation (AQ059-3-2)				☑		

EXEMPTION TABLE : MODULE BY MODULE (RFP)

Academic/Professional Qualifications	Module 1 Fund. of FP	Module 2 Risk Mgt/Ins.P	Module 3 Inv. Planning	Module 4 Tax Planning	Module 5 Est. Planning	Module 6 Ret. Planning
QUEST International University Perak (QUIP)						
Bachelor of Finance (Hons)						
- Foundation in Financial Planning (BFP 3101)	☑					
- Risk Management & Insurance Planning (BFP 3102)		☑				
- Investment Planning & Analysis (BFP 3103)			☑			
- Portfolio Management & Applications (BFI 2106)			☑			
- Tax Planning & Analysis (BFP 3104)				☑		
- Islamic Financial Planning (BFP 3108)					☑	
- Retirement Planning (BFP 3109)						☑
Bachelor of Science (Hons) Actuarial Sciences						
- Investment Planning & Analysis (BFP 3103)			☑			
- Portfolio Management & Applications (BFI 2106)			☑			
- Foundation in Financial Planning (BFP 3101)	☑					
- Tax Planning & Analysis (BFP 3104)				☑		
- Islamic Financial Planning (BFP 3108)					☑	
- Risk Management & Insurance Planning (BFP 3102)		☑				
- Retirement Planning (BFP 3109)						☑
Sunway University						
Bachelor (Hons) Financial Analysis with completion of FIN3154 & MFP3014	☑		☑			
Bachelor (Hons) Financial Economics with completion of FIN3154 & MFP3014	☑		☑			
Bachelor (Hons) in Finance with completion of FIN3154 & MFP3014	☑		☑			
Bachelor (Hons) in Accounting and Finance with completion of FIN3154 & MFP3014	☑		☑			
International Islamic University Malaysia (IIUM)						
Bachelor of Accounting Honours			☑	☑		
Bachelor of Business Administration with Honours			☑	☑		
Bachelor of Islamic Finance with Honours			☑	☑		
Bachelor of Economics Honours			☑	☑		