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ANNUAL REPORT 2024



Championship Award
(Islamic Finance Qualifications) 2021/22/23
Best Islamic Wealth Management
Qualification 2018/19/20
Championship Award (Advocacy) 2019
Best Islamic Finance Qualification 2016
Best Islamic Finance Education Provider 2015



WORLD
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CONGRESS

Best Educational
Institute in Banking
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Awards



Honourable Commendation for
Financial Planning Awareness Programs
Wen Hui Award for Educational Innovation 2014



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HRD CORP REGISTERED COURSE/
PROGRAMME NO:10001241103



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Suruhanjaya Sekuriti
Securities Commission
Malaysia

The RFP Programme is recognised by Bank Negara Malaysia and Securities Commission Malaysia as the approved qualification for Financial Adviser's Licence and Capital Market Services Licence respectively



RFP CAPSTONE PROGRAMME
"A Swift Path Forward to RFP Designation"



Championship Award
(Islamic Finance Qualifications) 2021/22/23
Best Islamic Wealth Management
Qualification 2018/19/20
Championship Award (Advocacy) 2019
Best Islamic Finance Qualification 2016
Best Islamic Finance Education Provider 2015



Best Educational
Institute in Banking
and Insurance 2016
Awards



Honourable Commendation for
Financial Planning Awareness Programs
Wen Hui Award for Educational Innovation 2014



One of the aims of Malaysia's New Economic Roadmap is to increase the pool of well-trained and educated human capital in the nation and to address the critical need for qualified Financial Planners to position Malaysia as the regional hub for Banking and Finance. This is a fast track pathway for Senior Executives and Regulators, for example those working with Bank Negara Malaysia, Securities Commission Malaysia, Inland Revenue Board of Malaysia, Employee Provident Fund, and those in Financial Services Institutions and Institutions of Higher Learning. Participants of the RFP Capstone Programme who successfully pass all the assessments and examinations shall be conferred the RFP designation.



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PROGRAMME OUTLINE

Module 1 - Fundamentals of Financial Planning

Module 2 - Risk Management & Insurance Planning

Module 3 - Investment Planning

Module 4 - Zakat & Tax Planning

Module 5 - Estate Planning

Module 6 - Retirement Planning

Module 7 - Applications in Financial Planning

Explore two engaging class mode options:

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or

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Inclusive of 8% SST
(5% Discount of tuition fee for
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- Only softcopy materials will be provided.
- The hardcopy is still available (upon payment) at 40% discount on Standard Rate
- No class recording is available



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ENTRY REQUIREMENTS

- ✓ Minimum 3 years' full-time working experience in a financial related industry and
- ✓ Shariah RFP, CFP, CIFP (Part 1) or
- ✓ Membership of MIA, MICPA, CPA (Aust.), ACCA, Bar Council, ICSA, MAICSA, CIMA or
- ✓ Relevant PhD, Masters or Bachelor's degree

ASSESSMENTS :

Project paper on Financial Plan & 100 Questions (MCQ)



For enquiries, please contact :
Education and Examination Department
Call : +603 - 6203 5899
Email : education@mfpc.org.my

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Notice of 21st Annual General Meeting



NOTICE IS HEREBY GIVEN THAT the 21st Annual General Meeting of the Council will be held at MFPC Office, Unit 22-7, Level 22, Menara One Mont Kiara (1MK), No.1, Jalan Kiara, Mont Kiara, 50480 Kuala Lumpur on 24th June 2025 at 2:00 p.m. for the following purposes:

Meeting Agenda

1. Opening Address by the President.
2. To receive and approve the minutes of the 20th Annual General Meeting.
3. To receive the Treasurer's Report and the Audited Accounts for the year ended 31st December 2024.
4. To receive the Secretary's Report for the year ended 31st December 2024.
5. To re-appoint Azman, Wong Salleh & Co as the Auditors of the Council to hold office until the conclusion of the next Annual General Meeting and to authorise the National Council to fix their remuneration.
6. To conduct the 10th MFPC Election Proceedings.
7. To transact any other business which may properly be transacted at an Annual General Meeting for which due notice of 30 days shall have been given by virtue of clause 9-10 of the Constitution.

By order of the National Council of MFPC,

Anthony Ang Sang Nang

Secretary

Kuala Lumpur

30th May 2025

Notes:

Voting Members may appoint a proxy to attend and vote at any general meeting of the Council on his or her behalf. The instrument appointing a proxy shall be in writing and signed by the Member appointing the proxy. A proxy shall be a Member of the MFPC. A Member, except the Chairman of the Meeting, shall not be entitled to represent more than one (1) Member as his or her proxy. To be valid, Proxy Form must be completed and desposited with the Secretariat at Unit 22.7, Level 22, Menara One Mont Kiara (1MK), No. 1 Jalan Kiara, Mont Kiara, 50480 Kuala Lumpur not less than seventy-two (72) hours before the time of the meeting. **(Please download Proxy Form at MFPC at MFPC home page; www.mfpc.org.my).**

PRESIDENT'S MESSAGE

Dear Members

On behalf of the Council, I am honoured to present the 2024 Annual Report, highlighting our key activities and achievements over the past year. Following the celebration of our 20th anniversary, this 20th edition holds special significance. I would also like to take this opportunity to reflect on the journey ahead in 2025—a year of renewed purpose and promising developments.

2024: A Year of Progress and Achievement

MFPC had a productive and successful year, strengthening its collaboration with the Capital Market Development Fund (CMDf) and advancing nine approved initiatives. These include the third instalment of longitudinal research, the second Malaysian Financial Planning Day, aimed at inspiring aspiring financial planners, and the Financial Planning e-Roadshow, conducted in collaboration with professional bodies. Other key initiatives included the Professionalism and Ethics e-Forum and a series of Retirement Planning e-Workshops targeting youth audiences.

Enhancing Industry Professionalism

To further support industry professionals, MFPC introduced several initiatives, including the Certification in Retirement Planning Programme, the CMSRL Scholarship Programme, the Internship Programme, and enhancements to the e-Learning Management System.

Financial Performance

I am pleased to present the audited Financial Statements for 2024, which reflect results comparable to the previous year. Net surplus before tax increased nominally to approximately RM1.05 million, supported by a 15% rise in revenue, reaching RM5.5 million. While revenue grew, this was accompanied by a proportional increase in expenditure.

Celebrating 20 Years of MFPC

MFPC commemorated its 20th anniversary with a

grand celebration, marking two decades of contributions to Malaysia's financial services sector. The 20th Anniversary Luncheon coincided with the 11th Conference on Shariah Wealth Management & Financial Planning, reinforcing our commitment to advancing Shariah-based financial practices.

To further promote financial literacy, MFPC launched the inaugural My Money & Me Guide, endorsed with a Foreword from the Minister of Finance II. This practical resource, developed by financial planning experts, aims to empower Malaysians in making informed financial decisions and achieving financial independence.

MFPC also formalised strategic partnerships with nine esteemed organisations through Memorandums of Understanding (MoUs), strengthening collaboration in advancing financial planning practices.

Expanding MFPC's International Presence

MFPC reinforced its global footprint in financial education and planning by establishing the UNESCO Entrepreneurship Education Network (EE Net) Malaysia Chapter. Representatives participated in high-profile international events, including the UNESCO EE Net Annual Conference in China, the UNESCO-APEID Meeting on Entrepreneurship Education in Uzbekistan, and a financial literacy programme in Türkiye, in collaboration with the Finance Office of the Presidency of Türkiye.

Additionally, the International Development Committee engaged with Indonesian regulatory bodies at Universitas Indonesia, further expanding MFPC's international initiatives.

Introducing a New Certification Framework

In 2024, MFPC launched the RFP and Shariah RFP Modular Certification Programmes, offering greater flexibility to industry practitioners through modular professional titles aligned with specific areas of specialisation. Eligible candidates must be active MFPC members and pass Module 1,

In 2024, MFPC launched the RFP and Shariah RFP Modular Certification Programmes, offering greater flexibility to industry practitioners through modular professional titles aligned with specific areas of specialisation. Eligible candidates must be active MFPC members and pass Module 1, plus any one of Modules 2 through 6. In total, ten modular professional titles are available—five under the RFP track and five under the Shariah RFP track.

To support insurance and takaful agents in meeting the requirements of the Professionalism of Insurance and Takaful Agents (PITA) Policy Document, MFPC enhanced the Risk Management & Insurance Planning Module 2, introducing self-paced video learning and practice questions, offered free of charge to improve learning effectiveness. Several other enhancements initiated in 2024 are already in the implementation pipeline.

Fostering Industry Collaboration and Development

MFPC, in collaboration with AFA, successfully hosted its first Sharing Session. Key presentations featured insights on maximising the CMDF-MFPC Scholarships and Internships Programmes, along with expert discussions on enhancing firms' competitiveness and talent development among financial planning professionals.

As in previous years, MFPC remained committed to delivering educational seminars, providing valuable insights and contributing meaningfully to the professional and technical development of participants. These efforts continue to support our mission of elevating industry standards and fostering excellence.

Acknowledgements and Looking Ahead

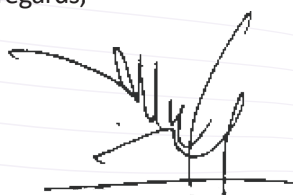
As I enter my third year as President, I extend my heartfelt gratitude to all MFPC members, National Council members, Board and Committee members, Chapter Committees, and the MFPC Secretariat for their dedication, hard work, and unwavering support.

I hope this report provides valuable insights into the breadth and depth of the Council's initiatives and accomplishments. While we celebrate our progress, we recognise the opportunities for further development and engagement. As I continue my term in office, I reaffirm my commitment to enhancing our programmes, delivering exceptional learning experiences and initiatives for the benefit of all members.

I look forward to welcoming you to our Annual General Meeting.

Thank you.

Warm regards,



Andy Ng Yen Heng
President, Malaysian Financial Planning Council

MFPC SHARIAH ADVISORY COMMITTEE



**Y.Bhg. Prof. Datuk Dr Syed Othman
bin Syed Hussin Alhabshi**
Chairman
Former Chief Academic Officer,
Dean of Faculty, INCEIF
Registered Shariah Adviser,
Securities Commission Malaysia



Assoc. Prof. Dr Shafaai bin Musa
Independent Non-Executive Director,
Public Islamic Bank Berhad
Chairman, Shariah Committee,
CIMB Islamic Bank
Member of Shariah Committee,
Agrobank



Dr. Ahcene Lahsasna
Executive Director
Chief Executive Officer,
SALIHIN Shariah Advisory Sdn Bhd
Registered Shariah Adviser,
Securities Commission Malaysia

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LEMBAH KLANG 22 FEB 2025	PULAU PINANG 26 APRIL 2025	MELAKA 24 MAY 2025	PAHANG 21 JUN 2025	BATU PAHAT 12 JULAI 2025	PERAK 16 OGOS 2025	SARAWAK 27 SEPT 2025	SABAH 15 NOV 2025
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NATIONAL COUNCIL 2023-2025



Mr. Andy Ng Yen Heng
President



Mr. Phang Kar Yew
Deputy President



Mr. Vincent Kwo Shih Kang
Immediate Past President



Mr. Mohamad Sani Bin Ayob
Vice President
External Relations & Publicity



Major (Rtd) Leow Nan Chung
Vice President
Membership



**Prof. Dr Mohammad
Fazli Bin Sabri**
Vice President
Research & Publication



Mr. Anthony Ang Sang Nang
Secretary
Chairman, Certification & CPD Board



Mr. Toi See Jong
Treasurer
Chairman, Admin &
Finance Committee



Mr. Kolandasamy A/L Savarimuthu
Chairman, Ethics & Compliance Board
National Council Member



Mr. Maheswaran A/L Periasamy
Chairman, Examination Board
National Council Member



Mr. Anuar Shuib
Chairman, International Development
Committee
National Council Member



Mr. Jordan Peh Kian Hong
Chairman, Youth Committee
National Council Member



**Adjunct Prof. Dr. Desmond
Chong Kok Fei**
National Council Member



**Dato' Paduka Javern Lim
Chong Hee**
National Council Member



Mrs. Haslindah Binti Atan
National Council Member



Ms. Quah Yean Lin
National Council Member



Ms. Sharizad Binti S.A.Ghouse
National Council Member

MFPC CHAPTERS 2023-2025



Mr. Charles Tan Swee Choon
Chairman Penang Chapter



Mr. Kenny Tan Kock Un
Chairman Johor Chapter



Mr. Leow Chuen Kiat
Chairman East Coast Chapter



Mr. Chai Nyit Ngen
Chairman Sabah Chapter



Mr. Chang Kwang Cheat
Chairman Sarawak Chapter

**The Professionalism
of Insurance and
Takaful Agents
(PITA) Programme**



MFPC BOARDS AND COMMITTEE 2023-2025

EXTERNAL RELATIONS AND PUBLICITY COMMITTEE

1. **EN. MOHAMAD SANI BIN AYOB**
Vice President for External Relations and Publicity
(appointed with effect from August 2023)
2. **TN HJ. RAFIE BIN OMAR**
Committee Member
(appointed with effect from August 2023)
3. **DR. NORLIDA BINTI JAAFAR**
Committee Member
(appointed with effect from August 2023)
4. **DR. AHCENE LAHSASNA**
Committee Member
(appointed with effect from August 2023)
5. **MR. LAI CHI SHENG**
Committee Member
(appointed with effect from August 2023)

MEMBERSHIP COMMITTEE

1. **MAJOR (RTD) LEOW NAN CHUNG**
Vice President for Membership
(appointed with effect from June 2023)
2. **MR. CHAI NYIT NGEN**
Committee Member
(appointed with effect from August 2023)
3. **MR. CHANG KWANG CHEAT**
Committee Member
(appointed with effect from August 2023)
4. **MR. CHARLES TAN SWEE CHOON**
Committee Member
(appointed with effect from August 2023)
5. **MR. KENNY TAN KOCK UN**
Committee Member
(appointed with effect from August 2023)
6. **MR. LEOW CHUEN KIAT**
Committee Member
(appointed with effect from August 2023)
7. **DR. MOHD TAIPOR BIN SUHADAH**
Committee Member
(appointed with effect from August 2023)
8. **MR. MOHD IDHAM BIN MOHAMAD IDRIS**
Committee Member
(appointed with effect from August 2023)

RESEARCH & PUBLICATION COMMITTEE

1. **PROF. DR. MOHAMMAD FAZLI BIN SABRI**
Vice President for Research & Publication
(appointed with effect from June 2023)
2. **MR. ANTHONY ANG SANG NANG**
Committee Member
(appointed with effect from August 2023)
3. **DR. DESMOND CHONG KOK FEI, ADJUNCT PROF**
Committee Member
(appointed with effect from August 2023)
4. **PROF. DR. CATHERINE SOKE FUN HO**
Committee Member
(appointed with effect from August 2023)
5. **PROF. DR. LAU SIONG HOOK**
Committee Member
(appointed with effect from August 2023)
6. **PROF. DR. NURUL SHAHNAZ AHMAD MAHDZAN**
Committee Member
(appointed with effect from August 2023)

7. **DR. AZWAN ABDULLAH**
Committee Member
(appointed with effect from August 2023)

CERTIFICATION AND CPD BOARD

1. **MR. ANTHONY ANG SANG NANG**
Chairman
(appointed with effect from August 2023)
2. **MRS. HASLINDAH BINTI ATAN**
Deputy Chairman
(appointed with effect from August 2023)
3. **ASSOC. PROF. DR. ZAEMAH BINTI ZAINUDDIN**
Committee Member
(appointed with effect from August 2023)
4. **DR. TAN THAI SOON**
Committee Member
(appointed with effect from August 2023)
5. **MR. ETHAN TEH ENG TECK**
Committee Member
(appointed with effect from August 2023)
6. **MR. JACK LIN KOK LEONG**
Committee Member
(appointed with effect from August 2023)
7. **DR. DAVID KHOONG TAI WAI**
Committee Member
(appointed with effect from August 2023)

EXAMINATION BOARD

1. **MR. MAHESWARAN A/L PERIASAMY**
Chairman
(appointed with effect from August 2023)
2. **MS. QUAH YEAN LIN**
Deputy Chairman
(appointed with effect from August 2023)
3. **ASSOC. PROF. DR. HAZIANTI BINTI ABDUL HALIM**
Committee Member
(appointed with effect from August 2023)
4. **DR. HAJAH ZALINA BINTI MOHD ISHAK**
Committee Member
(appointed with effect from August 2023)
5. **MR. JASON NG KWONG YONG**
Committee Member
(appointed with effect from August 2023)
6. **DR. LEOW HON WEI**
Committee Member
(appointed with effect from August 2023)
7. **MRS. WAHIDA BINTI SHARIFF**
Committee Member
(appointed with effect from August 2023)

MFPC BOARDS AND COMMITTEE 2023-2025

EXAMINATION QUALITY CONTROL COMMITTEE

- MS. QUAH YEAN LIN**
Chairman
(appointed with effect from August 2023)
- DR. HAJAH ZALINA BINTI MOHD ISHAK**
Committee Member
(appointed with effect from August 2023)
- ASSOC. PROF. DR. HAZIANTI BINTI ABDUL HALIM**
Committee Member
(appointed with effect from August 2023)
- MR. JASON NG KWONG YONG**
Committee Member
(appointed with effect from August 2023)
- DR. LEOW HON WEI**
Committee Member
(appointed with effect from August 2023)

ADMIN & FINANCE COMMITTEE

- MR. TOI SEE JONG**
Chairman
(appointed with effect from August 2023)
- MR. ANTHONY ANG SANG NANG**
Deputy Chairman
(appointed with effect from August 2023)
- MR. LEW CHEE SEONG**
Committee Member
(appointed with effect from August 2023)
- MRS. HASLINDAH BINTI ATAN**
Committee Member
(appointed with effect from August 2023)
- MR. KENNY CHONG CHING SHON**
Committee Member
(appointed with effect from August 2023)
- MRS. WAHIDA BINTI SHARIFF**
Committee Member
(appointed with effect from August 2023)

AUDIT COMMITTEE

- MR. FOO KIN VOON**
Chairman
(appointed with effect from August 2023)
- MR. LEOW CHUEN KIAT**
Committee Member
(appointed with effect from August 2023)
- MR. MOHD SHAFIQ BIN SAMSUDIN**
Committee Member
(appointed with effect from August 2023)
- MR. MUHAMMAD BIN MOHSIN**
Committee Member
(appointed with effect from August 2023)

ELECTION COMMITTEE

- MR. EZAMSHAH BIN ISMAIL**
Chairman
(appointed with effect from August 2023)
- MR. ALEX FOONG SOO HAH**
Committee Member
(appointed with effect from August 2023)
- MR. KARUNAMOORTHY A/L KUMARASWAMY**
Committee Member
(appointed with effect from August 2023)

- MR. MICHAEL KOK FOOK ON**
Committee Member
(appointed with effect from August 2023)
- DATO' HAJI SYED MOHEEB B. SYED KAMARULZAMAN**
Committee Member
(appointed with effect from August 2023)
- MR. VINCENT KWO SHIH KANG**
Committee Member
(appointed with effect from August 2023)
- DATO' STEVE ONG CHONG GAIN**
Committee Member
(appointed with effect from August 2023)

ETHICS & COMPLIANCE BOARD

- MR. KOLANDASAMY A/L SAVARIMUTHU**
Chairman
(appointed with effect from June 2023)
- PROF. DR. MOHAMAD FAZLI BIN SABRI**
Deputy Chairman
(appointed with effect from Jan 2024)
- DATIN VERONICA SELVANAYAGY**
Board Member
(appointed with effect from August 2023)
- MR. KARUNAMOORTHY A/L KUMARASWAMY**
Board Member
(appointed with effect from August 2023)
- MR. AMEER ALI BIN VALI MOHAMED**
Board Member
(appointed with effect from January 2024)
- DR. SYED ADAM ALHABSHI**
Board Member
(appointed with effect from January 2024)

YOUTH COMMITTEE

- MR. JORDAN PEH KIAN HONG**
Chairman
(appointed with effect from August 2023)
- MS. NOR IRA ENATI BINTI ISMAIL**
Committee Member
(appointed with effect from August 2023)
- MR. FIZREE BIN MD FAUZI**
Committee Member
(appointed with effect from August 2023)
- MR. CHEOK YEE HERNG**
Committee Member
(appointed with effect from August 2023)
- DR. MUHAMMAD HANIF BIN YAHAYA**
Committee Member
(appointed with effect from August 2023)
- MS. YAP YUEN SI**
Committee Member
(appointed with effect from August 2023)

MFPC BOARDS AND COMMITTEE 2023-2025

INTERNATIONAL DEVELOPMENT COMMITTEE

- MR. ANUAR BIN SHUIB**
Chairman
(appointed with effect from August 2023)
- DR. AHCENE LAHSASNA**
Committee Member
(appointed with effect from August 2023)
- MR. MILLION LO WEI HONG**
Committee Member
(appointed with effect from August 2023)
- MR. MOHAMAD SANI BIN AYOB**
Committee Member
(appointed with effect from August 2023)
- MR. PHANG KAR YEW**
Committee Member
(appointed with effect from August 2023)
- MS. NORIZAN BINTI YAHYA**
Committee Member
(appointed with effect from August 2023)
- MS. WAN INTAN BAHYAH BINTI WAN SUFFIAN**
Committee Member
(appointed with effect from August 2023)

PENANG CHAPTER COMMITTEE

- MR. CHARLES TAN SWEE CHOON**
Chairman
(appointed with effect from June 2023)
- MR. TAY PHAIK KEAN**
Secretary
(appointed with effect from August 2023)
- MR. SANJEEVI A/L RAMALINGGAM**
Treasurer
(appointed with effect from September 2023)
- MR. AW WIN CHAN**
Assistant Secretary
(appointed with effect from August 2023)
- MS. GOON LIN YEN**
Committee Member
(appointed with effect from August 2023)
- MS. KOAY YEE CHIAN**
Committee Member
(appointed with effect from August 2023)
- MS. TOO JOO MING**
Committee Member
(appointed with effect from January 2025)
- MS. MABELLE TAN SWEE CHING**
Committee Member
(appointed with effect from August 2023)
- MS. LIM VON XIAO**
Committee Member
(appointed with effect from July 2024)

JOHOR CHAPTER COMMITTEE

- MR. KENNY TAN KOCK UN**
Chairman
(appointed with effect from June 2023)
- ASSOC. PROF. DR. ABDUL JALIL BIN OMAR**
Deputy Chairman
(appointed with effect from September 2023)
- MRS. NUR AIMI BINTI YAHYA**
Secretary
(appointed with effect from September 2023)

- MR. PERIYASAMY A/L CHINNAPPAIAN**
Treasurer
(appointed with effect from September 2023)
- MR. FAIZAL BIN ABU AL-ASHARI**
Committee Member
(appointed with effect from September 2023)
- MR. LIM HSUEH SHEN**
Committee Member
(appointed with effect from September 2023)

SARAWAK CHAPTER COMMITTEE

- MR. CHANG KWANG CHEAT**
Chairman
(appointed with effect from June 2023)
- MR. HOW FU YAW**
Deputy Chairman
(appointed with effect from September 2023)
- MS. TING NGA PING**
Secretary
(appointed with effect from September 2023)
- MR. WONG SHI YING**
Treasurer
(appointed with effect from September 2023)
- MR. BYRON CHONG KA SHEN**
Committee Member
(appointed with effect from September 2023)
- MR. LEONNARD TAN KOK SING**
Committee Member
(appointed with effect from October 2023)

EAST COAST CHAPTER COMMITTEE

- MR. LEOW CHUEN KIAT**
Chairman
(appointed with effect from June 2023)
- DR. MUHAMMAD HANIF BIN YAHAYA**
Deputy Chairman
(appointed with effect from June 2023)
- MRS. AFIDA LIYANA BINTI YAHYA**
Secretary
(appointed with effect from June 2023)
- DR. AHMAD SHAUQI BIN HAJI MOHAMAD ZUBIR**
Treasurer
(appointed with effect from June 2023)
- MRS. LIM SIEW LI**
Committee Member
(appointed with effect from June 2023)
- MR. MOHD AZMAN BIN PAUZI**
Committee Member
(appointed with effect from June 2023)
- MRS. CHONG SOON LAN**
Committee Member
(appointed with effect from June 2023)
- DR. WAN MOHD NAZRI BIN WAN DAUD**
Committee Member
(appointed with effect from June 2023)

MFPC BOARDS AND COMMITTEE 2023-2025

SABAH CHAPTER COMMITTEE

1. **MR. CHAI NYIT NGEN**
Chairman
(appointed with effect from June 2023)
2. **MR. PHILIP CHANG MIN LEONG**
Deputy Chairman
(appointed with effect from June 2023)
3. **MR. GOH CHEE HYUNG**
Secretary
(appointed with effect from June 2023)
4. **MR. KELVIN EN JIA YEN**
Treasurer
(appointed with effect from June 2023)
5. **MS. ANG SOI YUK**
Committee Member
(appointed with effect from June 2023)
6. **MS. ERINN YAPP TZE HSING**
Committee Member
(appointed with effect from June 2023)
7. **MS. EYVONNE LIEW YEE VUN**
Committee Member
(appointed with effect from June 2023)



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STATEMENT OF ACCOUNTS FOR THE YEAR ENDED 31 DEC 2024

National Council Members

Andy Ng Yen Heng

Phang Kar Yew

Vincent Kwo Shih Kang

Mohamad Sani Bin Ayob

Major (Rtd) Leow Nan Chung

Prof. Dr. Mohamad Fazli Bin Sabri

Anthony Ang Sang Nang

Toi See Jong

Kolandasamy A/L Savarimuthu

Maheswaran Periasamy

Anuar Bin Shuib

Dr Desmond Chong Kok Fei

Haslindah Binti Atan

Dato' Javern Lim Chong Hee

Jordan Peh Kian Hong

Quah Yeah Lin

Sharizad Binti S.A.Ghouse

Registered Office

Unit 22.7, Level 22
 Menara One Mont' Kiara
 No.1, Jalan Kiara
 Mont' Kiara
 50480 Kuala Lumpur

Administrative and Correspondence Address

Unit 22.7, Level 22
 Menara One Mont' Kiara
 No.1, Jalan Kiara
 Mont' Kiara
 50480 Kuala Lumpur

President to National Council

Andy Ng Yen Heng

Secretary to National Council

Anthony Ang Sang Nang

Treasurer to National Council

Toi See Jong

Auditors

Azman, Wong, Salleh & Co.
 (AF: 0012)
 Chartered Accountants

Currency

Ringgit Malaysia (RM)

STATEMENT OF FINANCIAL POSITION AS AT 31 DECEMBER 2024

	Note	2024 RM	2023 RM
ASSETS			
Non-current Assets			
Property, plant and equipment	5	3,171,485	3,132,935
Intellectual property	6	57,345	29,975
		3,228,830	3,162,910
Current Assets			
Fees receivables		475,127	366,444
Other receivables, deposits and prepayments	7	1,017,170	1,008,625
Tax recoverable		432,776	232,161
Short term deposits	8	2,892,197	2,112,149
Cash and bank balances		582,020	376,212
		5,399,290	4,095,591
Total Assets		8,628,120	7,258,501
ACCUMULATED FUNDS AND LIABILITIES			
Accumulated Funds			
Surplus brought forward		6,561,567	5,522,167
Surplus of income over expenditure for the year		948,445	1,039,400
Surplus carried forward		7,510,012	6,561,567
Non-Current Liabilities			
Deferred tax liabilities	9	32,000	4,300
		32,000	4,300
Current Liabilities			
Other payables, accruals and provisions	10	658,929	330,284
Deferred income	11	427,179	362,350
		1,086,108	692,634
Total Liabilities		1,118,108	696,934
Total Accumulated Funds and Liabilities		8,628,120	7,258,501

STATEMENT OF INCOME AND EXPENDITURE FOR THE YEAR ENDED 31 DECEMBER 2024

	Note	2024 RM	2023 RM
Income from membership	12	984,803	844,205
Income from core activities	13	2,132,808	1,355,709
Income from other activities	14	2,007,542	1,847,921
		5,125,153	4,047,835
Other income	15	373,118	735,241
Total income		5,498,271	4,783,076
Expenses from core activities	13	659,177	434,209
Expenses from other activities	14	1,243,948	991,587
Employment related expenses	16	1,687,006	1,514,450
Administrative and operating expenses		633,919	537,666
Amortisation of intellectual property		13,882	15,276
Depreciation of property, plant and equipment		161,291	170,087
Other expenses		47,853	48,536
Finance costs		-	46,644
Total expenses		4,447,076	3,758,455
Net surplus before taxation	17	1,051,195	1,024,621
Taxation	18	(102,750)	14,779
Net surplus after taxation		948,445	1,039,400

STATEMENT OF CHANGES IN ACCUMULATED FUNDS FOR THE YEAR ENDED 31 DECEMBER 2024

Note	Accumulated Funds RM	Total RM
Balance as at 1 January 2023	5,522,167	5,522,167
Net surplus for the year	1,039,400	1,039,400
Balance as at 31 December 2023	<u>6,561,567</u>	<u>6,561,567</u>
Net surplus for the year	948,445	948,445
Balance as at 31 December 2024	<u><u>7,510,012</u></u>	<u><u>7,510,012</u></u>

STATEMENT OF CASH FLOWS FOR THE YEAR ENDED 31 DECEMBER 2024

	2024 RM	2023 RM
CASH FLOWS FROM OPERATING ACTIVITIES		
Surplus of income over expenditure for the year before taxation	1,051,195	1,024,621
Adjustments for:-		
Amortisation of intellectual property	13,882	15,276
Depreciation on property, plant and equipment	161,291	170,087
Interest on term loans	-	46,644
Operating surplus	1,226,368	1,256,628
(Increase)/decrease in fees receivables	(108,683)	443,126
Increase in other receivables	(8,545)	(891,593)
Increase in payables	328,645	16,474
Increase/(decrease) in deferred income	64,829	(869,409)
Cash generated from/(used in) operation	1,502,614	(44,774)
Tax paid	(423,120)	(579,016)
Tax refund	147,455	-
Net cash generated from/(used in) operating activities	1,226,949	(623,790)
CASH FLOWS USED IN INVESTING ACTIVITIES		
Acquisition of intellectual property	(41,252)	(11,750)
Acquisition of property, plant and equipment	(199,841)	(92,380)
Net cash used in investing activities	(241,093)	(104,130)
CASH FLOWS USED IN FINANCING ACTIVITIES		
Repayment of term loans	-	(1,321,929)
Interest paid on term loans	-	(46,644)
Net cash used in financing activities	-	(1,368,573)
NET INCREASE/(DECREASE) IN CASH AND CASH EQUIVALENTS	985,856	(2,096,493)
CASH AND CASH EQUIVALENTS AT BEGINNING OF YEAR	2,454,462	4,550,955
CASH AND CASH EQUIVALENTS AT END OF YEAR	3,440,318	2,454,462

The notes on pages 5 to 20 form part of these financial statements.

NOTES TO THE FINANCIAL STATEMENTS - 31 DECEMBER 2024

1. GENERAL INFORMATION

The financial statements of Malaysian Financial Planning Council ("MFPC") were authorised for issue on 23 May 2025 by the National Council.

MFPC is registered under the Societies Act, 1966 and is domiciled in Malaysia.

MFPC has 21 (2023: 20) employees at the end of the financial year.

The address of the registered office and principal place of operation of MFPC is located at Unit 22.7, Level 22, Menara One Mont' Kiara, No.1, Jalan Kiara, Mont' Kiara, 50480 Kuala Lumpur.

MFPC is principally engaged in conducting the Registered Financial Planner ("RFP") program and Shariah Registered Financial Planner ("Shariah RFP"), to confer the RFP designation to qualified members and to ensure the discipline of the RFP designees.

There have been no significant changes in these activities during the year.

2. BASIS OF PREPARATION

The financial statements have been prepared in accordance with the Malaysian Private Entities Reporting Standard issued by the Malaysian Accounting Standards Board.

The financial statements of MFPC are prepared under the historical cost convention unless otherwise indicated in the summary of significant accounting policies.

The accounting policies disclosed below are consistent with those applied in the previous financial year.

3. SIGNIFICANT ACCOUNTING POLICIES

3.1 Intangible Assets - Intellectual Property

The costs of intellectual property that are acquired separately are capitalised as an intangible asset and are carried at costs less accumulated amortisation and any accumulated impairment losses. Costs include their purchase prices and any directly attributable costs of preparing the assets for their intended use. These costs are amortised on the straight-line basis over the period the assets are expected to generate economic benefits.

Costs associated with intellectual property that will generate probable future economic benefits from the use thereof are recognised as intangible assets. Costs comprise all directly attributable development costs including an appropriate portion of relevant overheads. Intellectual property cost is amortised when the cost asset is available for use over the period the assets are expected to generate economic benefits.

3. SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

3.1 Intangible Assets - Intellectual Property (Continued)

The annual amortisation rate used is as follows:

Intellectual property	20%
-----------------------	-----

The estimated useful life and amortisation method are reviewed at the end of each reporting period with the effect of any changes in estimates being accounted for on a prospective basis.

3.2 Property, Plant and Equipment

Property, plant and equipment are measured at cost less accumulated depreciation and accumulated impairment losses. Cost includes expenditure that is directly attributable to the acquisition of the asset.

The cost of replacing part of an item of property, plant and equipment is recognised in the carrying amount of the item or recognised as a separate asset, as appropriate, only when it is probable that future economic benefits associated with the item will flow to the Council and the cost of the item can be measured reliably. The carrying amount of the replaced part is derecognised. All other repairs and maintenance are recognised in statement of income and expenditure during the financial period in which they are incurred.

Property, plant and equipment are depreciated on the straight-line basis so as to write off the cost of the assets to their residual values over their estimated useful lives. The annual depreciation rates used are as follows :-

Office equipment	20%
Furniture and fittings	20%
Office renovation	20%
General administration and accounts support system	20%
Office premises	2%

The residual values and useful lives of assets are reviewed at each financial year end and adjusted prospectively, if appropriate, where expectations differ from previous estimates. Property, plant and equipment are reviewed for impairment in accordance with the Council's accounting policy for impairment of non-financial assets as disclosed in Note 3.5.

An item of property, plant and equipment is derecognised upon disposal or when no future economic benefits are expected from its use or disposal. The difference between the net disposal proceeds, if any, and the net carrying amount is recognised in statement of income and expenditure.

3. SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

3.3 Government Grants

Government grants are recognised initially as deferred income at fair value where there is reasonable assurance that they will be received and the Council will comply with the conditions associated with the grant.

Grants that compensate the Council for expenses incurred are recognised in statement of income and expenditure as income from other activities on a systematic basis in the same periods in which the expenses are recognised.

3.4 Income Recognition

Income from membership is recognised on the accrual basis.

Interest income is recognised on the accrual basis.

3.5 Impairment of Non-Financial Assets

The carrying amounts of non-financial assets (other than deferred tax assets) are reviewed for impairment at the end of each reporting period to determine whether there is any indication of impairment. If any such indication exists, the asset's recoverable amount is estimated to determine the amount of impairment loss.

An impairment loss is recognised if the carrying amount of an asset or a cash generating unit ("CGU") exceeds its recoverable amount. A CGU is the smallest identifiable group of assets that generates cash inflows that are largely independent of the cash inflows from other assets or group of assets.

The recoverable amount of an asset or CGU is the higher of its fair value less costs to sell and its value in use. In assessing value in use, the estimated future cash flows are discounted to their present value using a pre-tax discount rate that reflects current market assessments of the time value of money and the risks specific to the asset.

An impairment loss is recognised in statement of income and expenditure in the period in which it arises.

An impairment loss for an asset is reversed if, and only if, there has been a change in the estimates used to determine the asset's recoverable amount since the last impairment loss was recognised. The carrying amount of an asset is increased to its revised recoverable amount, provided that this amount does not exceed the carrying amount that would have been determined (net of amortisation or depreciation) had no impairment loss been recognised for the asset in prior years. A reversal of impairment loss for an asset is recognised in statement of income and expenditure.

3. SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

3.6 Financial Instruments

Initial recognition and measurement

The Council recognises a financial asset or a financial liability (including derivative instruments) in the statement of financial position when, and only when, the Council becomes a party to the contractual provisions of the instrument.

On initial recognition, all financial assets (including trade and other receivables) and financial liabilities (including trade and other payables) are measured at fair value, which is generally the transaction price, plus transaction costs if the financial asset or financial liability is not measured at fair value through profit or loss. For instruments measured at fair value through profit or loss, transaction costs are expensed to statement of income and expenditure when incurred.

Subsequent measurement of financial assets

For the purpose of subsequent measurement, the Council classifies financial assets into two categories, namely: (i) financial assets at fair value through profit or loss, and (ii) financial assets at amortised cost.

After initial recognition, the Council measures investments in non-convertible preference shares, ordinary shares and derivatives that are publicly traded at their fair values assets by reference to the active market prices, if observable, or otherwise by a valuation technique, without undue cost or effort.

Investments in debt instruments, whether quoted or unquoted, are subsequently measured at amortised cost using the effective interest method. Investments in unquoted equity instruments and whose fair value cannot be reliably measured are measured at cost.

Other than financial assets measured at fair value through profit or loss, all other financial assets are subject to review for impairment.

Subsequent measurement of financial liabilities

After initial recognition, the Council measures all financial liabilities at amortised cost using the effective interest method, except for derivatives instruments that are liabilities, which are measured at fair value.

Derecognition of financial instruments

A financial asset is derecognised when, and only when, the contractual rights to receive the cash flows from the financial asset expire, or when the Council transfers the contractual rights to receive cash flows of the financial asset, including circumstances when the Council acts only as a collecting agent of the transferee, and retains no significant risks and rewards of ownership of the financial asset or no continuing involvement in the control of the financial asset transferred.

3. SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

3.6 Financial Instruments (Continued)

Subscriptions which have been outstanding for a period exceeding 12 months and are considered to be uncollectible are written off.

A financial liability is derecognised when, and only when, it is legally extinguished, which is either when the obligation specified in the contract is discharged or cancelled or expired. A substantial modification of the terms of an existing financial liability is accounted for as an extinguishment of the original financial liability and the recognition of a new financial liability.

Fair value measurement of financial instruments

The fair value of a financial asset or a financial liability is determined by reference to the quoted market price in an active market, and in the absence of an observable market price, by a valuation technique as described in Note 3.11.

Recognition of gains and losses

Fair value changes of financial assets and financial liabilities classified as at fair value through profit or loss are recognised in statement of income and expenditure when they arise.

For financial assets and financial liabilities carried at amortised, a gain or loss is recognised in statement of income and expenditure only when the financial asset or financial liability is derecognised, and through the amortisation process of the instrument.

Impairment of financial assets

An amount of impairment loss in respect of financial assets measured at amortised cost is measured as the difference between the asset's carrying amount and the present value of estimated future cash flows discounted at the financial asset's original effective interest rate, i.e., the effective rate computed at initial recognition. The carrying amount of the asset is reduced through an allowance account. The amount of loss is recognised in statement of income and expenditure.

An amount of impairment loss in respect of financial assets carried at cost is measured as the difference between the carrying amount of the financial asset and the best estimate of the amount (which might be zero) that the Council would receive for the asset if it were to be sold at the reporting date.

If in a subsequent period the amount of the impairment loss on financial assets decreases and the decrease can be related objectively to an event occurring after the impairment was recognised, the previously recognised impairment loss is reversed by adjusting the allowance account to the extent that the carrying amount of the financial asset does not exceed its amortised cost had the impairment not been recognised at the date the impairment is reversed. The amount of reversal is recognised in statement of income and expenditure.

3. SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

3.7 Employee Benefits

Short Term Benefits

Salaries, allowances, bonuses and other short term benefits are accrued for in the period in which the associated services are rendered by employees of the Council.

Post-employment benefits

The Council has a post-employment benefits scheme in accordance with local practice in Malaysia.

A defined contribution plan is a pension plan under which the Council pays fixed contributions into a separate entity (a fund) and will have no legal constructive obligations to pay further contributions if the fund does not hold sufficient assets to pay all employee benefits relating to employee service in the current and prior periods.

The Council's contributions to a defined contribution plan are charged to the statement of income and expenditure in the period to which they relate. Once the contributions have been paid, the Council has no further payment obligations.

3.8 Taxation

Tax expense is the aggregate amount of current and deferred taxes. Current and deferred taxes are recognised as income or expense in statement of income and expenditure except to the extent that the taxes relate to items recognised outside profit or loss, either in other comprehensive income or directly in equity.

Current tax is the expected tax payable on the taxable profit for the year and is calculated using tax rates enacted or substantively enacted at the end of the reporting period.

Deferred tax is recognised, using the liability method, on temporary differences at end of the reporting period between the carrying amounts of assets and liabilities in the financial statements and the amounts attributed to those assets and liabilities for taxation purposes.

Deferred tax liabilities are recognised for all taxable temporary differences and deferred tax assets are recognised for all deductible temporary differences and unabsorbed tax losses and unused tax credits to the extent that it is probable that future taxable profit will be available against which the assets can be utilised.

The carrying amount of deferred tax assets is reviewed at the end of each reporting period and is reduced to the extent that it is no longer probable that the related tax benefits will be realised.

Tax rates enacted or substantively enacted at the end of the reporting period are used to determine deferred tax.

Deferred tax assets and liabilities are offset when there is a legally enforceable right to set off current tax assets against current tax liabilities and when they relate to income taxes levied by the same taxation authority and the Council intends to settle its current tax assets and liabilities on a net basis.

3. SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

3.9 Cash and Cash Equivalents

Cash equivalents are short-term, highly liquid placements that are readily convertible to known amounts of cash and which are subject to an insignificant risk of changes in value.

3.10 Provisions

Provisions are recognised when the Council has a present legal and constructive obligation as a result of past events and it is probable that an outflow of resources embodying economic benefits will be required to settle the obligation and a reliable estimate can be made of the amount of the obligation. Where the effect of time value of money is material, the amount of provision is measured at the present value of the expenditure expected to be required to settle the obligation using a pre-tax rate that reflects current market assessments of the time value of money and the risks specific to the liability. Where discounting is used, the increase in the amount of a provision due to passage of time is recognised as finance cost.

3.11 Fair Value Measurement

For assets, liabilities and equity instruments (whether financial or non-financial items) that require fair value measurement or disclosure, the council establishes a fair value measurement hierarchy that gives the highest priority to quoted prices (unadjusted) in active markets for identical assets, liabilities or equity instruments and the lowest priority to unobservable inputs.

A fair value measurement of an item is estimated using a quoted price in an active market if that price is observable. The active market is the principal market for the asset or liability or, in the absence of a principal market, the most advantageous market for the asset or liability; and for which the group can enter into a transaction for the asset or liability at the price in that market at the measurement date.

In the absence of an active market price, the fair value of an item is estimated by an established valuation technique using inputs from the market place that are observable for substantially the full term of the asset or liability.

In the absence of both market price and observable inputs, a fair value measurement of an item is estimated by an established valuation technique using unobservable inputs, including internally developed assumptions that are reasonable and supportable.

3.12 Borrowing cost

All borrowing costs are recognised in profit or loss in the period when they are incurred.



4. CRITICAL ACCOUNTING JUDGEMENTS AND KEY SOURCES OF ESTIMATION UNCERTAINTY

The preparation of financial statements in conformity with the Malaysian Private Entities Reporting Standard requires management to exercise their judgement in the process of applying the Council's accounting policies and which may have significant effects on the amounts recognised in the financial statements. It also requires the use of accounting estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the results reported for the reporting period and that may have a significant risk of causing a material adjustment to the carrying amounts of assets and liabilities within the next financial year. Although these judgements and estimates are based on the management's best knowledge of current events and actions, actual results may differ.

The estimates and underlying assumptions are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

In the process of applying the Council's accounting policies, which are described in Note 3, the management is of the opinion that any instances of application of judgement are not expected to have significant effect on the amounts recognised in the financial statements and there were not any significant key accounting estimates or assumptions that would have a significant risk of causing a material adjustment to the carrying amount of assets and liabilities within the next financial year.



Championship Award
Islamic Finance Qualification 2021/22/23
Best Islamic Wealth Management
Qualification 2018/19/20
Championship Award (Education) 2019
Best Islamic Finance Qualification 2016
Best Islamic Finance Education Provider 2015



Best Educational
Institute in Banking
and Insurance 2016
Awards



Honourable Commendation for
Financial Planning Awareness Programs
Wen Pui Award for Educational Innovation 2014



5. PROPERTY, PLANT AND EQUIPMENT

	Office Equipment RM	Furniture and Fittings RM	Office Renovation RM	General Administration and Accounts Support System RM	Office Premises RM	Total RM
Cost:						
At 1 January 2023	394,892	80,200	336,965	406,715	3,308,800	4,527,572
Addition	39,890	-	3,200	49,290	-	92,380
At 31 December 2023	434,782	80,200	340,165	456,005	3,308,800	4,619,952
Addition	15,177	39,545	25,455	119,664	-	199,841
At 31 December 2024	449,959	119,745	365,620	575,669	3,308,800	4,819,793
Accumulated Depreciation:						
At 1 January 2023	344,525	71,307	282,092	337,757	281,249	1,316,930
Charge for the year	28,185	4,695	39,164	31,867	66,176	170,087
At 31 December 2023	372,710	76,002	321,256	369,624	347,425	1,487,017
Charge for the year	33,083	6,459	15,771	39,802	66,176	161,291
At 31 December 2024	405,793	82,461	337,027	409,426	413,601	1,648,308
Net Book Value						
- At 31 December 2023	62,072	4,198	18,909	86,381	2,961,375	3,132,935
- At 31 December 2024	44,166	37,284	28,593	166,243	2,895,199	3,171,485

6. INTELLECTUAL PROPERTY

	Shariah RFP Course Material RM	RFP Course Material RM	Total RM
Cost:			
At 1 January 2023	442,269	102,720	544,989
Addition	4,500	7,250	11,750
At 31 December 2023	446,769	109,970	556,739
Addition	15,000	26,252	41,252
At 31 December 2024	461,769	136,222	597,991
Accumulated Amortisation:			
At 1 January 2023	426,224	85,264	511,488
Charge for the year	9,725	5,551	15,276
At 31 December 2023	435,949	90,815	526,764
Charge for the year	6,138	7,744	13,882
At 31 December 2024	442,087	98,559	540,646
Net Book Value			
- At 31 December 2023	10,820	19,155	29,975
- At 31 December 2024	19,682	37,663	57,345

7. OTHER RECEIVABLES, DEPOSITS AND PREPAYMENTS

	2024 RM	2023 RM
Fixed deposit interest receivable	12,753	53,432
Deposits	23,011	22,520
Prepayments	64,906	50,273
Capital Market Development Fund (CMDf)	882,400	882,400
Other receivables	34,100	-
	<u>1,017,170</u>	<u>1,008,625</u>

8. SHORT TERM DEPOSITS

	2024 RM	2023 RM
Short term deposits placed with licensed banks	<u>2,892,197</u>	<u>2,112,149</u>

Included in short term deposits is a deposit amounting to RM33,899 (2023: RM33,899) which is held under lien as security against a bank guarantee facility granted to the Council, issued in favour of the Human Resource Development Board.

9. DEFERRED TAXATION

	2024 RM	2023 RM
Balance as at 1 January	4,300	8,200
Statement of Income and Expenditure (Note 18)	27,700	(3,900)
Balance as at 31 December	32,000	4,300

Deferred tax (assets)/liabilities arising from:

	At beginning of year RM	Recognised in profit or loss RM	At end of year RM
2024			
Excess of capital allowance over depreciation	4,300	27,700	32,000
Unabsorbed tax losses	13,287	(13,287)	-
	17,587	14,413	32,000
2023			
Excess of capital allowance over depreciation	8,200	(3,900)	4,300
	8,200	(3,900)	4,300

10. OTHER PAYABLES, ACCRUALS AND PROVISIONS

	2024 RM	2023 RM
Other payables	285,928	10,435
Accruals and provisions	373,001	319,849
	658,929	330,284

11. DEFERRED INCOME

This amount primarily consists of membership fees received in advance.

12. INCOME FROM MEMBERSHIP

	2024 RM	2023 RM
Entrance fees		
- Individual	110,700	56,400
- Corporate	3,000	1,200
Subscription		
- Individual	798,603	721,105
- Corporate	72,500	65,500
	984,803	844,205

13. NET INCOME FROM CORE ACTIVITIES

	2024 RM	2023 RM
Income		
Exemption fees	319,972	155,150
Professionalism of Insurance and Takaful Agents Programme (PITA)	565,840	-
M7 Class	213,710	249,848
Shariah M7	2,450	59,730
Shariah RFP Capstone	278,217	168,639
RFP by Course	97,244	164,258
RFP by Self Study	90,020	93,795
RFP Capstone Programme	203,219	229,553
Shariah RFP by Course	87,200	61,520
Shariah RFP by Self Study	32,700	26,060
Short courses	242,236	147,156
	2,132,808	1,355,709
Less : Expenses		
Professionalism of Insurance and Takaful Agents Programme (PITA)	286,767	470
M7 Class	55,018	82,892
Shariah M7	400	18,829
Shariah RFP Capstone	83,228	63,974
RFP by Course	28,241	58,266
RFP by Self Study	21,400	26,400
RFP Capstone Programme	64,245	84,386
Shariah RFP by Course	21,452	33,100
Shariah RFP by Self Study	8,800	8,200
Short courses	89,626	57,692
	659,177	434,209
	<u>1,473,631</u>	<u>921,500</u>

14. NET INCOME FROM OTHER ACTIVITIES

	2024 RM	2023 RM
Income		
Public Financial Planning Workshop	95,941	62,900
My Money & Me FP Workshop	7,000	5,000
9th Islamic Wealth Management & Financial Planning	92,340	46,210
Special Projects	32,000	29,651
Capital Market Development Fund (CMDf)	1,583,771	1,702,980
East Coast Chapter	450	1,180
Sabah Chapter	1,140	-
HRDCorp Financial Training Programme	65,379	-
Personal Development Initiative Programme	108,410	-
International Development and Regulatory Partnership	21,111	-
	2,007,542	1,847,921

14. NET INCOME FROM OTHER ACTIVITIES (CONTINUED)

	2024 RM	2023 RM
Less : Expenses		
Penang Chapter	-	290
Public Financial Planning Workshop	46,370	61,946
My Money & Me FP Workshop	3,598	829
9th Islamic Wealth Management & Financial Planning	200,924	1,083
MFPC National Financial Planning Tournament 2023	-	48
Special Projects	14,739	13,946
Capital Market Development Fund (CMDf)	852,358	911,410
East Cost Chapter	4,779	2,035
Sabah Chapter	5,684	-
HRDCorp Financial Training Programme	40,614	-
Personal Development Initiative Programme	50,313	-
ESG - Social wellbeing sessions	18,034	-
International Development and Regulatory Partnership	6,535	-
	1,243,948	991,587
	<u>763,594</u>	<u>856,334</u>

15. OTHER INCOME

	2024 RM	2023 RM
RFP & Shariah RFP Textbook	1,740	4,840
RFP & Shariah RFP Exercise Booklet & Reference Kit	13	75
Other income	15,382	9,529
Continuing Professional Development ("CPD") copyright fee	172,000	558,800
CPD programme endorsement	22,600	23,700
Reinstatement fee	21,200	16,220
Financial 1st advertisement	73,725	35,859
Fixed deposit interest income	39,369	86,218
Refund accreditation fees	21,000	-
Unutilised staff training fund	6,089	-
	<u>373,118</u>	<u>735,241</u>

16. EMPLOYMENT RELATED EXPENSES

	2024 RM	2023 RM
Administrative advertisement	2,550	2,041
Bonus	203,991	203,529
Employee Provident Fund ("EPF")	185,187	160,489
Employment Insurance System ("EIS")	1,895	1,670
Meal allowance	620	-
Medical expenses	7,156	10,082
Office refreshment	2,758	1,661
Salary	1,216,976	1,074,586
Social security contribution ("SOCSSO")	16,584	14,612
Staff training	-	31,333
Staff welfare	9,731	14,447
Staff wellness	39,558	-
	<u>1,687,006</u>	<u>1,514,450</u>

17. NET SURPLUS BEFORE TAXATION

	2024 RM	2023 RM
Surplus before taxation has been arrived at after charging:		
Depreciation of property, plant and equipment	161,291	170,087
Amortisation of intangible asset	13,882	15,276
Auditor's remuneration	7,000	7,000
Interest on term loans	-	46,644
	<u>-</u>	<u>46,644</u>

18. TAXATION

	2024 RM	2023 RM
Current income tax expense	94,050	19,000
Overprovision of taxation in prior year	<u>(19,000)</u>	<u>(29,879)</u>
	75,050	(10,879)
Deferred taxation (Note 9)	<u>27,700</u>	<u>(3,900)</u>
	<u>102,750</u>	<u>(14,779)</u>

Tax is levied on chargeable income of the Council based on graduated rates.

Being a trade council, its members' subscriptions are exempted from tax in accordance with the Income Tax (Exemption) (No. 19) Order 2005.

18. TAXATION (CONT'D)

A reconciliation between the tax applicable to the surplus before taxation and the current year's tax expense is as follows:-

	2024 RM	2023 RM
Surplus before taxation	<u>1,051,195</u>	<u>1,024,621</u>
Tax on surplus at 26% (2023: 24%)	273,311	245,909
Tax effect of :		
- differential in tax due to reduced tax rates	(19,600)	-
- expenses not deductible for tax purposes	336	68,821
- income exempted from tax	(140,452)	(300,226)
Under provision of deferred tax liability in prior year	8,155	596
Overprovision of tax in prior year	<u>(19,000)</u>	<u>(29,879)</u>
	<u>102,750</u>	<u>(14,779)</u>

Subject to agreement with the relevant tax authorities, the Company has estimated unutilised tax losses amounting to NIL (2023: RM207,296) available to set-off against future taxable income.

Pursuant to the Finance Act 2018, any unutilised tax losses for the year of assessment 2019 onwards shall be available for utilisation for a maximum period of seven consecutive years of assessment immediately following that year of assessment and any excess at the end of the seventh year shall be disregarded. The Finance Act 2021 which became effective on 1 January 2022 has extended the maximum period for carrying forward of the unutilised tax losses to 10 years with effect from year of assessment 2019. Consequently, the unutilised tax losses of the Company at the end of the reporting period shall expire in the year of assessment as tabulated below: -

Year of assessment	2024 RM	2023 RM
2023	<u>-</u>	<u>207,296</u>

19. NOTES TO STATEMENT OF CASH FLOWS

(a) Purchase of property, plant and equipment

Property, plant and equipment acquired by the Council during the year were by the following means:-

	2024 RM	2023 RM
Cash payments	<u>199,841</u>	<u>92,380</u>

Property, plant and equipment acquired by term loans financing are reflected as cash flows from financing activities based on the principal amount of instalments made.

19. NOTES TO STATEMENT OF CASH FLOWS (CONT'D)

(b) Cash and cash equivalents at end of year

	2024 RM	2023 RM
Short term deposit	2,892,197	2,112,149
Cash and bank balances	582,020	376,212
	<u>3,474,217</u>	<u>2,488,361</u>
Less: Deposits pledged with licensed bank as security (Note 8)	(33,899)	(33,899)
	<u>3,440,318</u>	<u>2,454,462</u>

20. FINANCIAL INSTRUMENTS

A financial instrument is any contract that gives rise to both a financial asset of one party and a financial liability or equity instrument of another party.

Financial assets of the Council include cash and bank balances, fees receivables, other receivables and deposits and short term deposits.

Financial liabilities of the Council include term loans, payables and accruals and provisions.

The Council's financial instruments are categorised as follows:-

	2024 RM	2023 RM
(a) Financial assets measured at amortised cost		
Fees receivables	475,127	366,444
Other receivables and deposits*	887,358	958,351
Short term deposits	2,892,197	2,112,149
Cash and cash bank balances	582,020	376,212
	<u>4,836,702</u>	<u>3,813,156</u>

* Exclude prepayments

(b) Financial liabilities measured at amortised cost

Payables, accruals and provisions	658,929	330,284
	<u>658,929</u>	<u>330,284</u>

21. COMPARATIVE FIGURES

The presentation for income from membership, net income from core activities, net income from other activities and other income have been changed during the year for better presentation in the Statement of Profit or Loss and Other Comprehensive Income. These changes have no impact to the Statement of Financial Position.

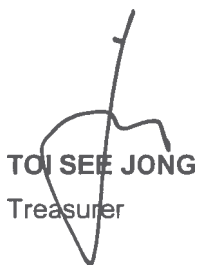
STATEMENT BY NATIONAL COUNCIL

We, ANDY NG YEN HENG and TOI SEE JONG, being two of the members of the National Council of MALAYSIAN FINANCIAL PLANNING COUNCIL ("MFPC"), state that in the opinion of the National Council, the financial statements set out on pages 1 to 20 are drawn up in accordance with the Malaysian Private Entities Reporting Standard and the requirements of the Societies Act 1966, so as to give a true and fair view of the financial position of MFPC as at 31 December 2024 and of its financial performance and cash flows for the year ended on that date.

On behalf of the National Council,



ANDY NG YEN HENG
President



TOI SEE JONG
Treasurer

Kuala Lumpur,
Date: **23 MAY 2025**

azman, wong, salleh & co (No. AF 0012)

akauntan bertauliah
chartered accountants



INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF MALAYSIAN FINANCIAL PLANNING COUNCIL

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of Malaysian Financial Planning Council ("MFPC"), which comprise the statement of financial position as at 31 December 2024, and the statement of income and expenditure and statement of cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies, as set out on pages 1 to 20.

In our opinion, the accompanying financial statements give a true and fair view of the financial position of the Council as at 31 December 2024, and of its financial performance and its cash flows for the year then ended in accordance with Malaysian Private Entities Reporting Standard and the requirements of the Societies Act, 1966 in Malaysia.

Basis for Opinion

We conducted our audit in accordance with approved standards on auditing in Malaysia and International Standards on Auditing. Our responsibilities under those standards are further described in the *Auditors' Responsibilities for the Audit of the Financial Statements* section of our report. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Independence and Other Ethical Responsibilities

We are independent of the Council in accordance with the By-Laws (on Professional Ethics, Conduct and Practice) of the Malaysian Institute of Accountants ("By Laws") and the International Ethics Standards Board for Accountants' Code of Ethics for Professional Accountants (including International Independence Standards) ("IESBA Code"), and we have fulfilled our other ethical responsibilities in accordance with the By-Laws and the IESBA Code.

Responsibilities of the Council Members for the Financial Statements

The Council Members are responsible for the preparation of financial statements of the Council that give a true and fair view in accordance with Malaysian Private Entities Reporting Standard and the requirements of the Societies Act, 1966 in Malaysia. The Council Members are also responsible for such internal control as the Council Members determine is necessary to enable the preparation of financial statements of the Council that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements of the Council, the Council Members are responsible for assessing the Council's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Council Members either intend to liquidate the Council or to cease operations, or have no realistic alternative but to do so.

INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF MALAYSIAN FINANCIAL PLANNING COUNCIL

Report on the Audit of the Financial Statements (Cont'd)

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements of the Council as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with approved standards on auditing in Malaysia and International Standards on Auditing will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with approved standards on auditing in Malaysia and International Standards on Auditing, we exercise professional judgement and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements of the Council, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Council's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by the Council Members.
- Conclude on the appropriateness of the Council Members' use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Council's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditors' report to the related disclosures in the financial statements of the Council or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditors' report. However, future events or conditions may cause the Council to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements of the Council, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with the Council Members regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.



INDEPENDENT AUDITORS' REPORT TO THE MEMBERS OF MALAYSIAN FINANCIAL PLANNING COUNCIL

Other Matters

This report is made solely to the members of MFPC, as a body, in accordance with Section 26 of the Societies Act, 1966 in Malaysia and for no other purpose. We do not assume responsibility to any other person for the content of this report.

AZMAN, WONG, SALLEH & CO.
AF 0012
Chartered Accountants

NG ENG KIAT
01064/03/2025 J
Chartered Accountant

Kuala Lumpur,
Date: 23 May 2025



Championship Award
Islamic Finance Qualification 2021/22/23
Best Islamic Wealth Management
Qualification 2018/19/20
Championship Award (Education) 2019
Best Islamic Finance Qualification 2016
Best Islamic Finance Education Provider 2015



Best Educational
Institute in Banking
and Insurance 2016
Awards



Honourable Commendation for
Financial Planning Awareness Programs
Wen Pui Award for Educational Innovation 2014



SECRETARY'S REPORT: MFPC Signature Events

My Money & Me (Penang)

27 April 2024

MY www.mfpc.org.my
money&me

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Platform Rasmi



Hosted at Dewan Budaya, Universiti Sains Malaysia (USM) Pulau Pinang, this second instalment of My Money & Me for 2024 was officiated by YB Lim Hui Ying, Deputy Minister of Finance Malaysia. This cross-collaborative programme was facilitated by MFPC with the support of Bank Negara's Financial Education Network (FEN), Securities Commission Malaysia, FIMM, LHDN, BIX (Bond-Sukuk Information Exchange), Life Insurance Association of Malaysia (LIAM), Malaysian Takaful Association (MTA), and the Private Pension Administrator. The programme has been

endorsed by the Ministry of Youth and Sports, Rakan Muda and the Ministry of Higher Education. The deputy minister also emphasised the importance of financial literacy for an individual at any stage of their life cycle. Financial know-how is what would differentiate an individual's financial well-being in the years ahead. As each and every individual's financial well-being is important for Malaysia's economic future, it is critically important for each Malaysians to become financially literate at an early age.



MFPC 20th Anniversary Luncheon | 16 May 2024


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VKA Wealth Planners
MIFC MALAYSIAN
 FINANCIAL COUNCIL
AKPK ASSOCIATION
 OF KUALA LUMPUR
 PROFESSIONAL
 FINANCIAL PLANNERS



The Malaysian Financial Planning Council (MFPC) celebrated two decades of excellence with a grand luncheon held at World Trade Centre Kuala Lumpur. This milestone event brought together distinguished guests, industry leaders and collaborators, practitioners and members to celebrate past achievements and dedication towards the advancement of the wealth management and financial planning industry in Malaysia.

Andy Ng Yen Heng, MFPC President of National Council welcomed guests, and Ybhg. Dr. Norhana Endut, Assistant Governor of Bank Negara Malaysia delivered the keynote address before launching the MFPC My Money & Me Guide

and Modular Certification Title. The former is MFPC's very own basic financial planning guide for public consumption, part of our continuous efforts to promote financial literacy in Malaysia and beyond. The latter is our new innovation in providing modular professional titles to industry players, according to the specialisation they want to pursue – insurance/takaful planning, investment planning, zakat & tax planning, retirement planning or estate planning.

The event also saw the signing of MoUs with nine collaborators for the advancement of financial planning practices in the country: the Malaysian Takaful Association (MTA), Malaysia Insurance Institute (MII), Association of Shariah

Advisors in Islamic Finance (ASAS), Islamic Banking and Finance Institute Malaysia (IBFIM), Association of Islamic Banking and Financial Institutions Malaysia (AIBIM), The Society of Trust and Estate Practitioners Malaysia (STEP Malaysia), Quest MasteryAsia Group, Universiti Sains Malaysia (USM) and Universiti Sultan Zainal Abidin (UniSZA). We hope this recognition of ongoing collaboration will mutually benefit our respective stakeholders and significantly contribute to the overall growth and future development of the industry.

MFPC also honoured 20 industry players with our own recognition, the MFPC Excellence in Financial Planning Award – for their diverse and unwavering dedication and contributions to the advancement of the financial planning industry in Malaysia, in four categories:

- (i) **Innovative Practice and Contributions** - Kumpulan Wang Simpanan Pekerja (KWSP) and Agensi Kaunseling dan Pengurusan Kredit (AKPK);
- (ii) **Financial Planning Education Impact and Outreach** - Kenanga Investors Berhad (KIB); Great Eastern Life Assurance Malaysia Berhad; Allianz Life Insurance Malaysia Berhad; Amanah Saham Nasional Berhad (ASNB); VKA Wealth Planners Sdn. Bhd.; Philips Wealth Planners

Sdn. Bhd.; Universiti Pendidikan Sultan Idris (UPSI); Universiti Utara Malaysia (UUM); Universiti Sains Islam Malaysia (USIM); and the Association of Financial Advisers (AFA);

- (iii) **Professionalism and Ethical Standards** – Life Insurance Association Malaysia (LIAM); the Malaysian Insurance Institute (MII); Malaysian Takaful Association (MTA), and the National Association of Malaysian Life Insurance and Family Takaful Advisors (NAMLIFA); and
- (iv) **Community Engagement and Positive Impact** – Lembaga Hasil Dalam Negeri Malaysia (LHDNM); Perbadanan Insurans Deposit Malaysia (PIDM); Federation of Investment Managers Malaysia (FIMM), and Universiti Putra Malaysia (UPM).



11th MFPC Conference on Shariah Wealth Management & Financial Planning

16 May 2024



11th MFPC CONFERENCE ON SHARIAH WEALTH MANAGEMENT & FINANCIAL PLANNING
 SHARIAH ESTATE PLANNING : PRESERVING WEALTH ACROSS GENERATIONS
 IN CONJUNCTION WITH **MFPC 20th ANNIVERSARY LUNCHEON**
 16th May 2024 | World Trade Centre, Kuala Lumpur | 8.30am - 3.30pm

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VKA
 Wealth Partners

MFPC successfully hosted the 11th MFPC Conference on Shariah Wealth Management & Financial Planning on 16th May 2024 at World Trade Centre, Kuala Lumpur. With the theme “Shariah Estate Planning: Preserving Wealth Across Generations” this prestigious event brought together keynote speakers, industry experts, practitioners, and academics to explore the evolving landscape of Shariah-compliant financial practices. The then-Executive Chairman of Securities Commission Malaysia, Dato’ Seri Dr. Awang Adek Hussin delivered the keynote address as the Guest of Honour, and launched the Research Report on Financial Capability & Utilization of Financial Advisory Services in Malaysia 2024, the 3rd instalment of a continuous study funded by the Capital Market Development Fund (CMDf). The Report focuses on 3 objectives:

- (i) to investigate the general financial capability of Malaysians;
- (ii) to determine Malaysians’ literacy pertaining to the Capital Market; and
- (iii) to understand Malaysians’ preferences

regarding financial advisory services. The previous reports were published in 2018 and 2020 respectively. A panel of industry experts gave presentations during the conference including Adj. Prof. Dato’ Ahmad Saruji Abdul Aziz (CEO & MD, Amanah Warisan Berhad), who spoke on “Global Perspectives on Estate Planning: A Comparative Analysis of International Practices and Malaysia’s Achievements.” This was followed by a talk by Farah Deba Mohamad Sofian, Chair of STEP Malaysia on “Legacy Blueprint: Crafting Effective Strategies for Shariah Wealth Preservation.” The event continued with a compelling discussion on “Case Studies Corner: Learning from Successful Shariah Estate Plans” by Mr. Anuar Shuib (Chairman, MFPC International Development Committee), Ms. Irda Rina Kamarulbahrain (CEO, TSI Wealth Planners Sdn Bhd) and Ms. Amna Fazillah Binti Ismail (Executive Vice President, As-Salihin Trustee Berhad). The roundtable discussion was moderated by Mr. Norfadelizan Abdul Rahman (Head of Secretariat, MIFC Leadership Council).



20th MFPC Annual General Meeting 25 June 2024



MFPC held its 20th Annual General Meeting on 25th June 2024 at the secretariat's office in Mont' Kiara, Kuala Lumpur. Representatives from permanent organisational voting members - Life Insurance Association of Malaysia (LIAM), The Malaysian Insurance Institute (MII), National Association of Malaysia and Life Insurance & Family Takaful Advisors (NAMLIFA), Association of Financial Advisers (AFA), and Malaysian Takaf-

ul Association (MTA) were present to ensure the AGM quorum was met. Collaborators, state chapters and members from all over the country also joined in this hybrid event. Apart from reviewing the past year's achievements, the AGM discussed future plans and reiterated the council's commitment to taking the Malaysian financial planning industry to greater heights.

My Money & Me (Kuching) 5 October 2024

MY money&me
www.mfpc.org.my

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The final My Money & Me Financial Planning Workshop of 2024 was held at the Sarawak Islamic Information Centre Auditorium in Kuching. This impactful event attracted almost 200 participants who benefitted from insightful sessions by our collaborators - LHDNM covered tax benefits for all, FEN offered ways to avoid money scams, while LIAM spoke on the importance of life insurance protection and nomination. The Securities Commission Malaysia stressed the need for checking before investing, and FIMM presented on the Unit Trust and Private Retirement Schemes. The sessions continued with BIX Malaysia introducing Bond and Sukuk and lastly, the PPA offered ways of empowering retirement journey. This workshop concluded with a closing ceremony officiated by YBhg Dato Wee Hong Seng, the Mayor of Kuching South.



Malaysian Financial Planning Day | 12 October 2024



LEAD ORGANISER



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The Malaysian Financial Planning Council (MFPC) successfully organised the second Malaysian Financial Planning Day (MFPD) at the Securities Commission Malaysia, drawing over 1,600 attendees, including industry leaders, practitioners, students, and members of the public. The event featured 18 exhibition booths from licensed financial planning firms and participation from 18 universities and tertiary institutions nationwide. Co-organised by MFPC alongside the Financial Planning Association of Malaysia (FPAM), the Association of Financial Advisors Malaysia (AFA), and the Malaysia Financial Planner and Advisor

Association (MFPA), MFPD provided an engaging platform for participants to explore financial planning careers and gain insights into the industry. With the theme “Financial Learning for Youth,” the programme offered interactive sessions, expert talks, and a roundtable discussion on the intricacies of financial planning as a profession while also addressing how Artificial Intelligence (AI) is reshaping the industry. Officiated by Puan Meha Binti Kasbun, Director, Corporate Resources of Securities Commission Malaysia, the event celebrated youth empowerment and career readiness.



THE VIRTUAL INDUSTRY FORUM: PROFESSIONALISM & ETHICS 2024

28th November 2024

THE VIRTUAL INDUSTRY FORUM 2024 PROFESSIONALISM & ETHICS "ETHICAL GOVERNANCE IN EMERGING MARKETS"

LEAD ORGANISER



SUPPORTED BY



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The Malaysian Financial Planning Council (MFPC) successfully hosted the Virtual Industry Forum: Professionalism & Ethics 2024 on 28 November 2024, themed "Ethical Governance in Emerging Markets." Co-organised with the Association of Financial Advisers Malaysia (AFA), Financial Planning Association of Malaysia (FPAM), and Malaysian Financial Planners & Advisers Association (MFPAA), the forum gathered over 1,200 participants, including financial professionals, academics, and industry leaders. The event featured insightful discussions on ethical governance, corporate responsibility, and legal considerations in financial planning, concluding with a roundtable session addressing the role of ethics in fostering resilience and trust in emerging markets.

The forum featured esteemed speakers, including Ms. Sujatha Sekhar Naik (Malaysian Institute of Corporate Governance), Datuk Wira Ismitz Matthew De Alwis (Kenanga Investors Group), and Dr. Syed Adam Al-habshi (Raja, Darryl & Loh), who explored governance frameworks, ethical dilemmas, and legal challenges in financial planning. A distinguished panel discussion, moderated by Mr. Ameer Ali Bin Vali Mohamed (Yayasan Pembangunan Ekonomi Islam Malaysia), further examined the integration of ethical values in governance. The event concluded with closing remarks by Mr. S.K. Samy, Chairman of MFPC's Ethics and Compliance Board, reaffirming MFPC's dedication to upholding professionalism and ethical standards in the financial services industry.

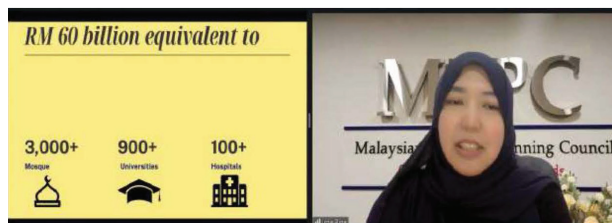


MFPC ACTIVITIES, WEBINARS, EXHIBITIONS & CLASSES

Holistic Legacy Planning

7 January 2024

Chief Executive Officer of TSI Wealth Planners Sdn Bhd, Ms Irda Rina Kamarulbahrain, spoke about wealth distribution, and elaborated on estate planning and inheritance.



Industry Talk with UUM

8 January 2024

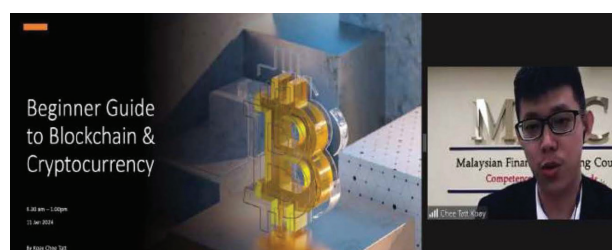


At this event in Universiti Utara Malaysia (UUM), MFPC's representative, a speaker from licensed financial planning firm TSI Wealth Planners, spoke about MFPC and exemptions granted to students wanting to pursue a career in financial planning with the RFP/Shariah RFP certification. Topics included a background of the financial planning industry, and the career prospects of a financial planner.

Beginner's Guide to Blockchain and Cryptocurrency

11 January 2024

Hosted virtually by MFPC, the event presenter was Mr Koay Chee Tatt, Chief Executive Officer of Harvestkorp IFA Solutions Sdn Bhd. He spoke about the fundamentals of cryptocurrency, the exchange processes, and the investment and security issues involved.



P10 and MFPC Corporate Education Provider Signing Ceremony

17 January 2024

The MoA signing ceremony between MFPC and P10 Holdings Sdn Bhd (P10) saw the latter appointed as an Education Provider of MFPC's RFP programme, for the public. Starting with the RFP module 2 which is our gold standard in building a skilled and empowered industry of insurance intermediaries, the partnership's ultimate aim is for P10 to be an education provider for all of the Council's other modules. Through this partnership, we envision a robust exchange of knowledge, resources, and expertise. Our students will benefit from P10's industry insights, real-world experience, and state-of-the-art educational resources. P10 will gain valuable access to our pool of talented individuals, contributing to their professional growth and success. This partnership is the opportunity to redefine the landscape of corporate education, breaking down barriers and creating a pathway for continuous learning.



Industry Talk with University of Reading

24 January 2024

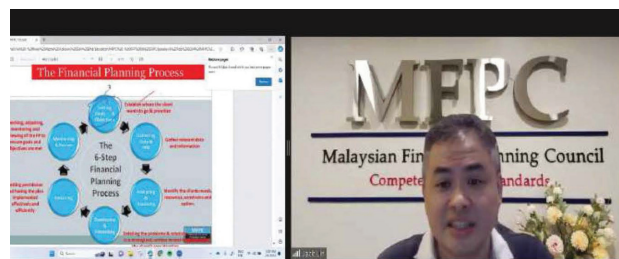


Mr Kenny Tan Kock Un, MFPC Johor Chapter Chairman, shared information about career prospects as a Financial Planner via MFPC's RFP/Shariah RFP certification, with University of Reading students.

Fundamentals of Financial Planning: Financial Statement Analysis

6 February 2024

Participants were introduced to the 6-Step Financial Planning Process, Financial Statement & Cashflow Statement, and Debt Management & Planning by Mr Jack Lin Kok Leong, Chief Executive Officer of Axen Alpha Advisory Sdn Bhd, a Bank Negara Malaysia-licensed financial planning firm.



My Money & Me FELDA Lurah Bilut

19 February 2024



Programme speaker Prof Dr Mohamad Fazli Sabri, MFPC National Council member and Vice President for Research & Publications, gave a series of presentations to the FELDA community on basic financial planning. This included budget planning, debt management and basic investment, and risks associated with it. My Money & Me is MFPC's signature financial literacy programme.

Financial Planning for Professionals Roadshow 2024

24 February 2024



MFPC, in collaboration with professional bodies including Balai Ikhtisas Malaysia (BIM), Chartered Tax Institute of Malaysia (CTIM), CFA Society, and The Chartered Institute of Logistics and Transport (CILT), conducted its first physical session of the Financial Planning for Professional Bodies Roadshow at Bankers Club, Kuala Lumpur. Fully supported by the Capital Market Development Fund (CMDf) and Bursa Malaysia, this event was a concerted effort to empower

professionals with necessary financial planning knowledge. Licensed financial planners from VKA Wealth Planners shared their expertise on Financial Planning Advisory Practice in Malaysia. This event has been endorsed as Continuing Professional Development (CPD) by the Bar Council, further validating its importance for legal professionals. Securities Commission (SC) Malaysia and Bank Negara Malaysia (BNM) licensed financial planners and advisors were at the venue to provide advisory services to the audience. Participants were given the chance to engage with experts in the field, ask questions and obtain insightful knowledge about how to improve their financial well-being and achieve their financial objectives.

My Money & Me (Selangor)

2 March 2024



Lindungi Kewangan Anda, Demi Masa Depan
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The first My Money & Me Programme for 2024 was launched by En Mohd Faisal bin Ibrahim, State Operations Director, LHDNM Selangor, and was hosted at Dewan Sri Mutiara, LHDNM Petaling Jaya on 2nd March 2024. MFPC presented sessions on Estate Planning, while LHDNM covered Tax Benefits for All and Prosperity. Bank Negara Malaysia offered ways to Avoid Money Scams, and the Importance of Insurance Coverage. The Securities Commission's presentation covered Checking Before Investing while FIMM presented on the Unit Trust and Private

Retirement Schemes for Future Investments. The PPA offered ways of Empowering Your Retirement Journey.

The My Money & Me Programme aligns with MFPC's mission to raise the standard of financial planning in Malaysia and promote the importance of professional financial advice. Through collaboration with industry partners and other organisations, MFPC aims to expand the reach of the programme and make financial education accessible to all Malaysians.



MoA Signing Ceremony with IIUM 13 March 2024



With the signing of this MoA, MFPC approved the International Islamic University Malaysia (IIUM) as an Education Provider offering its RFP and Shariah RFP programmes to their students and the public. Under this agreement, MFPC recognises IIUM's programmes pertaining to the exemptions for the Registered Financial Planner (RFP) and Shariah Registered Financial planner programme modules 1-6 to be granted to Bachelor of Accounting (Honours), Bachelor of Business Administration with Honours, Bachelor of Islamic Finance with Honours, and Bachelor of Economics (Honours) undergraduates to pursue a Financial Planner pathway, via the RFP or Shariah RFP certification.

The arrangement further strengthens the ties between MFPC and IIUM with IIUM agreeing to produce a minimum of 20 individuals having the Associate Shariah RFP or RFP designation for a year. In consideration of the good reputation and the quality of education offered at IIUM, MFPC is optimistic that this initiative will produce significant results and achieve success over the 5-year period. It is our hope that through these collaborative efforts of both entities, graduates from this University will be better positioned as prospective employees in the financial services sector.

Courtesy Visit by Institute of Finance Profession Myanmar and Quest MasteryAsia

14 March 2024

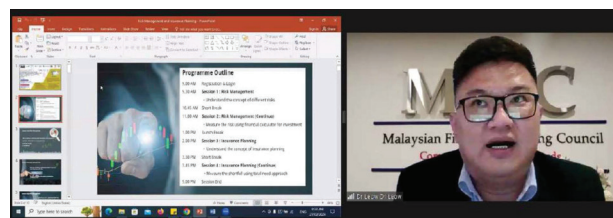


MFPC received a courtesy visit from Mr Aung Myo Paing, Executive director of Myanmar's Institute of Finance Profession, who was accompanied by Mr K C Lee, Chief Executive Officer of Quest MasteryAsia. Potential collaboration on an online public financial literacy programme and Modular Programme 1 (M1) was discussed, and the co-organisation of Modular Programme 2 (M2) with Myanmar's AIA Academy.

Risk Management & Insurance Planning

21 March 2024

MFPC-certified trainer Dr Leow Hon Wei conducted this webinar, imparting the concept of managing risks in financial planning together with insurance planning to the online audience.



Self Paced Professional & Ethics Forum 2023

1 April 2024

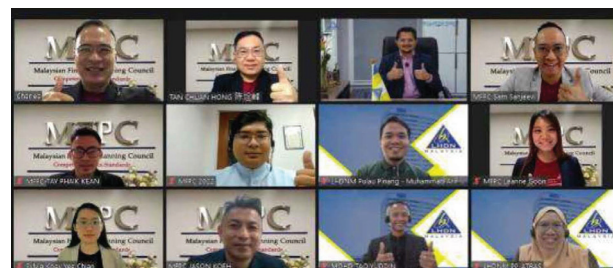


This virtual event was a pre-recorded, self-paced e-CPD session held to raise awareness about ethical issues and dilemmas in the development, deployment, and decision-making processes when using Artificial Intelligence (AI) and Machine Learning (ML) in delivering practical solutions, strategies, best practices and guidelines, with regard to the professionalism and ethics of the industry.

E-Filing & E-Invoicing Management Workshop

4 April 2024

A collaboration between MFPC and Lembaga Hasil Dalam Negeri Malaysia (LHDNM), this event saw expert input by two LHDNM specialists on e-Filing and e-Invoicing. Mr Charles Tan Swee Choon, Chairman of MFPC's Penang Chapter, gave the Welcome Address.



HRDC Public Programme: Fundamentals of Investment Planning

17 April 2024

The first Professional HRDC Public Programme for 2024, this one-day event saw Mr Anthony Ang Sang Nang and En Anuar Shuib speaking in-depth on investment planning with six industry participants.



HRDC Programme: Understanding the Malaysian Sales & Service Tax

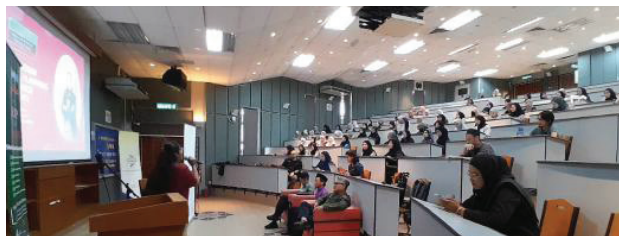
24 April 2024



This one-day Workshop welcomed more than 30 staff from Padiberas Nasional Berhad (BERNAS) who attended for a more comprehensive understanding of the Malaysian Sales & Service Tax (SST) system, from speaker Mr Leow Chuen Kiat of K S Leow Tax Consultants Sdn Bhd.

Industry Talk@IIUM

3 May 2024



This was held at International Islamic University Malaysia (IIUM). Mr Kaleon Leong Rahan, CEO of FIMM and Mr Mohd Fakhrul Radzi of TSI Wealth Planners shared insights and career prospects in financial planning industry with 91 undergraduates.

Industry Talk@UPSI

4 May 2024

Ms Ida Shafinaz from FIMM conducted a financial talk entitled “Smart Scam” for an audience of more than 100, from Universiti Pendidikan Sultan Idris (UPSI).



Industry Talk@INTI Subang

7 May 2024



115 participants from INTI International College Subang attended a financial talk by Ms Jasmine Liang of Kenanga Investors Berhad.

Industry Talk@UNITEN

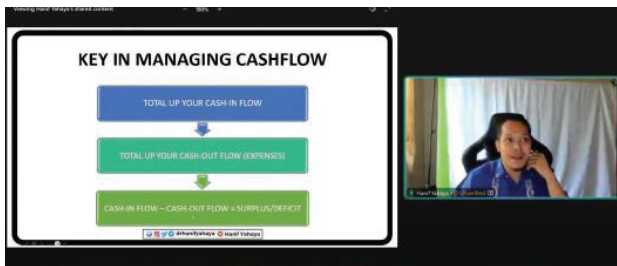
10 May 2024

MFPC organised a virtual financial talk about RFP Exemption Briefing, which saw the attendance of more than 30 students from Universiti Tenaga Nasional (UNITEN). Ms Lynn Say from FA Advisory shared about career pathways as a professional financial advisor.



Industry Talk@UPSI

11 May 2024



Dr Hanif Yahaya, Deputy Chairman of the MFPC Youth Committee and a licensed financial planner, presented "Financial IQ" to 35 scholars from Universiti Pendidikan Sultan Idris (UPSI).

InvestSmart@Johor 2024

17-19 May 2024

MFPC was one of the event partners for this annual flagship investor education event by Securities Commission Malaysia, held at the Mid Valley Exhibition Centre, in Mid Valley Southkey, Johor Bahru. This event featured talks, panel discussions and fireside chats by leading industry experts who shared insights into the Malaysian capital market and investment opportunities available.



Webinar: Retirement Planning for Youth e-Workshop

18 May 2024



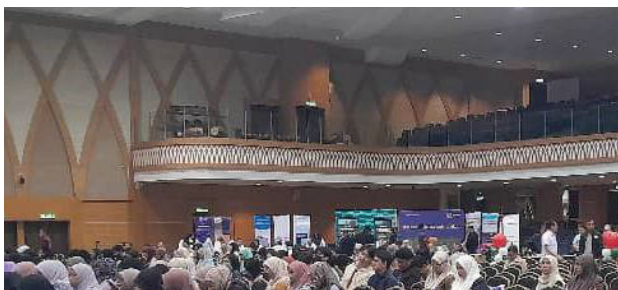
This virtual event was organised by MFPC in collaboration with UPSI and KWSP. More than 300 participants were given insights into the financial planning industry and retirement planning, specifically from Mr Jordan Peh, a licensed financial advisor from YES Financial and Mr Selamat Mulyana from KWSP Retirement Advisory.

This industry talk entitled Financial Plan DIY was organised by the UPSI Financial Planning Club. Mr Jordan Peh, MFPC Youth Committee Member, shared his industry insights with the club members.



Industry Talk@UTHM

26 May 2024



MFPC Secretariat introduced MFPC professional qualifications in financial planning and its mission to an audience of more than 100 at Universiti Tun Hussein Onn Malaysia (UTHM)

MFPC Certified Financial Coach Programme

31 May-2 June 2024, 7-9 June 2024 and 19-21 July 2024

In collaboration with Agensi Kaunseling & Pengurusan Kredit (AKPK), this 3-level personal development programme was held at Lanai Kijang, Bank Negara Malaysia. 20 AKPK staff attended all three levels of the programme, followed by three months of practical training and case studies, before being certified.



UniKL BIS VentureVibe Career Fair 2024

1 June 2024

MFPC participated as one of the exhibitors in this career fair organised by UniKL Business School. The secretariat interacted with the undergraduates about MFPC and career paths as financial planners.



Industry Talk@UniSZA

1 June 2024



MFPC organised RFP and Shariah RFP Exemption Briefing for more than 60 undergraduates at Universiti Sultan Zainal Abidin, Terengganu, followed by a career and financial talk by Dr Safwan and Mr Ahmad Zakwan, both certified with MFPC.

HRDC Public Programmes : Fundamentals of Retirement Planning

5 June 2024

This one-day HRDC professional public programme was held at Hilton, Petaling Jaya. Mr Jack Lin and Dr Zalina Mohd Ishak, from Axen Alpha Advisory and YES Financial, respectively, shared their knowledge and insights on retirement planning with participants.



Webinar: Professionalising Your Career with the RFP Designation

5 June 2024

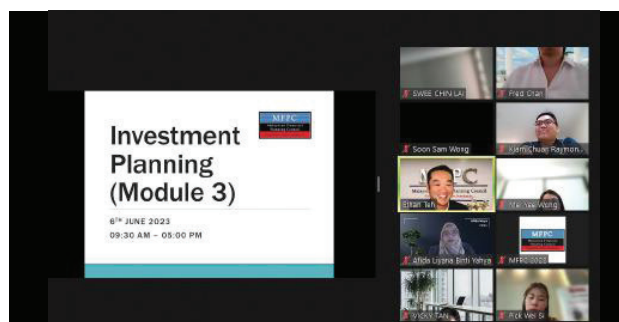


Mr Anthony Ang Sang Nang, Secretary of the MFPC National Council spoke about career enhancement via the MFPC Registered Financial Planner (RFP) professional qualification. This Webinar saw the participation of more than 70 Generali staff and agents in conjunction with "We Learn Week 2024."

Webinar: Investment Planning 101

6 June 2024

This webinar on fundamentals of investment planning was conducted by licensed financial planner Mr Ethan Teh Eng Teck from Firmus Financial. This was one of the mandatory CPD programmes for members, which saw public participation as well.



Mr Charles Tan Swee Choon, chairman of MFPC Penang Chapter, made a presentation about MFPC and awareness of the financial planning industry to more than 50 university students at INTI International College Penang.

HRDC Public Programme: Train-The-Trainer 2024

10-14 June 2024

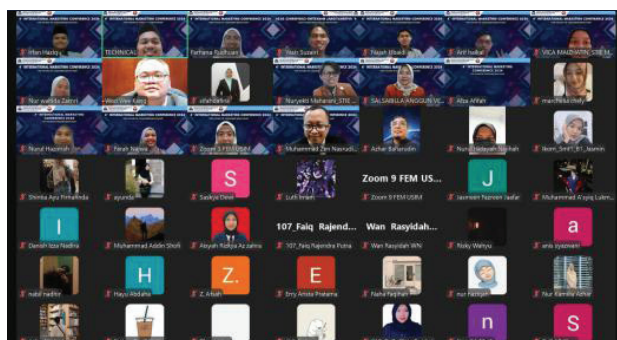


MFPC organised an HRDC Train The Trainer programme at Hilton Petaling Jaya, which was attended by 25 industry participants. The sessions were conducted by Ms Rita Krishnan, a HRD Corp-certified trainer. Participants had insights into the training fraternity, including inculcating the right attitude and how to achieve successful training programmes.

Industry Talk@USIM

26 June 2024

This virtual financial talk for youth was organised by MFPC with an Islamic Financial Planner Representative from TSI Wealth Planners, Mr Mohamad Azhar, as the speaker.



My Money & Me (Taiping)

29 June 2024



Lindungi Kewangan Anda, Demi Masa Depan
 "Protect Your Money, Secure Your Future"

Rakan Strategik



Disokong oleh



Platform Rasmi



The 3rd My Money & Me programme was conducted at Hotel Seri Malaysia Taiping, Perak on 29th June 2024. This event empowered Malaysians from different age groups with essential financial knowledge and practical skills to manage their personal finances effectively. We provided practical tips and encouraged participants to take proactive steps towards securing their financial future via financial talks, engagement at booths, and interactive activities through gamification.



MFPC-UUM MoU Signing at SEFB Financial Planning

2 July 2024

MFPC and Universiti Utara Malaysia (UUM) sealed a Memorandum of Understanding (MoU) in financial planning during the SEFB Financial Planning Symposium 2024 at the UUM Convention Centre. MFPC was represented by Mr Mohammad Sani Ayob, Vice President of External Relations and Publicity, and UUM was represented by its Vice-Chancellor, Prof. Dato' Dr Mohd Foad Sakdan. The MoU signifies a close relationship between MFPC and UUM that will enhance knowledge and collaboration in the financial planning field. The symposium was organised by the School of Economics, Finance and Banking (SEFB) UUM to promote the

financial planning industry and its career prospects. Apart from the MoU signing, the symposium also introduced MFPC and its roles in the financial planning industry, presented by Ms Chung Kar Yin, Executive Director, MFPC. This was followed by "Application of Financial Planning Knowledge" by Mr Charles Tan Swee Choon, the Chairman of MFPC Penang Chapter. Mr John Chan Ninyii, President of the Association of Financial Advisers Malaysia (AFA), CEO of YES Financial Berhad and a licensed financial planner, also shared his industry insights and financial planning career pathway.



14th Phillip Capital Investment Conference

6 July 2024



The 14th Phillip Capital Investment Conference, held at Berjaya Times Square on the theme “Seizing Opportunities in the New Global Geopolitics,” was aimed at equipping participants with the knowledge and strategies needed to thrive in a dynamic environment. The event featured 14 investment management companies sharing investment strategies in stocks, derivatives, and diversified investments. This hybrid event saw the participation of 3,726 industry players and members of the public. MFPC was the event partner for virtual live streaming, providing support throughout the day. We were also present at a physical booth at the venue, to meet and interact with participants.

Industry Talk@UCSI University

13 Jul 2024

This forum was held at UCSI University where Ms Jasmine Liang of Kenanga Investors Berhad, Mr Wong Kok Hong of Affin Bank Berhad and Mr Kyzen Tan of Censuria Capital shared insights and career prospects in financial planning industry with more than 60 undergraduates.



Financial Planning for Professional Bodies e-Roadshow (Kuantan)

20 Jul 2024



The second Financial Planning for Professional Bodies e-Roadshow 2024, held virtually back in July, has successfully attracted over 200 participants from across the region. This virtual event featured engaging sessions on financial planning advisory practice in Malaysia, investment planning, and retirement planning, presented by three licensed financial planners – Mr Idham Idris of WealthVantage, Mr Alfred Loke of PhillipCapital Malaysia and Dr Hanif Yahaya of MFPC East Coast Chapter. This impactful initiative aimed to enhance financial literacy and empower individuals with the tools for financial well-being, embodying MFPC’s commitment to fostering financial education and awareness nationwide.

Webinar: 5X Your Financial Advisory Income Through Financial Coaching

25 Jul 2024



This webinar was conducted by our seasoned speaker, Mr KC See on the MFPC e-Learning platform, which provided the 25 participants with valuable strategies to elevate their professionalism and financial advisory practices.

My Money & Me (Johor Bahru)

27 July 2024



Lindungi Kewangan Anda, Demi Masa Depan
 "Protect Your Money, Secure Your Future"

Rakan Strategik



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The 4th My Money & Me Workshop was conducted at Dewan Raya, Taman Bukit Indah, Johor Bahru, in collaboration with Pejabat Parlimen Pulai. With a range of speakers from Bank Negara Malaysia, Securities Commission Malaysia, BIX Malaysia, Lembaga Hasil Dalam Negeri, Malaysian Takaful Association, Federation of Investment Managers Malaysia, and the Private Pension Administrator Malaysia - this event empowered Malaysians from different age groups with essential financial knowledge and practical skills to manage their personal finances effectively.



HRDC Programme: Personal Financial Planning@Bumi Armada Berhad

14 Aug, 28 Aug & 9 Sep 2024

MFPC successfully conducted a series of three HRDC-claimable workshops on Personal Financial Planning at Bumi Armada Berhad on 14th August, 28th August, and 9th September 2024. The speaker was Mr Anthony Ang Sang Nang and the sessions attracted over 80 participants in total, providing valuable financial planning insights and practical knowledge to enhance personal financial management skills.



Premier Shariah RFP 2024

13, 14, 15 & 20, 21 August 2024

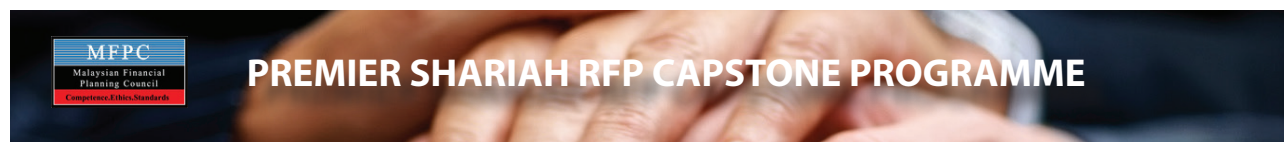
The Malaysian Financial Planning Council (MFPC) successfully conducted the Premier Shariah Registered Financial Planner (Shariah RFP) 2024 Programme from 13 to 15 and 20 to 21 August 2024, spanning five full days. The programme was held physically at Royale Chulan Damansara, Selangor, from 9:00 a.m. to 5:00 p.m. daily.

A total of 31 selected participants attended the programme, all of whom were invited based on stringent eligibility criteria. The participants comprised C-suite executives with a minimum of a bachelor's degree and over 10 years of professional experience, ensuring a high calibre of engagement and discourse throughout the sessions.

Notably, five CEOs from key industry players—AmMetLife Takaful Berhad, Islamic Banking and

Finance Institute Malaysia (IBFIM), Pheim Unit Trusts Berhad, P10 Holdings Sdn Bhd, and Kenanga Islamic Investors Berhad—were among the distinguished participants. Other attendees included industry leaders from the broader financial services industry, associations, and insurance and takaful operators (ITOs), as well as representatives from higher learning institutions.

The Premier Shariah RFP 2024 Programme was designed to deepen participants' understanding of Shariah-compliant financial planning principles, promote ethical practices, and elevate the professional standards of financial planning in Malaysia. Through interactive modules, expert-led sessions, and peer learning, the programme contributed meaningfully to the development of leadership in Islamic finance.



My Money & Me (Kota Bharu)

17 August 2024



Lindungi Kewangan Anda, Demi Masa Depan
 "Protect Your Money, Secure Your Future"

Rakan Strategik



Disokong oleh



FEN

KEMENTERIAN PENDIDIKAN TINGGI



Hosted at Dewan Misai Kucing, RTC Kota Bharu, Kelantan, this fifth installment of My Money & Me for 2024 was officiated by YB Dr Hafidzah Mustakim, ADUN Kota Lama. This cross-collaborative financial literacy workshop emphasised the importance of financial literacy for an individual at any stage of their life cycle. As each and every individual's financial well-being is important for Malaysia's economic future, it is critically important for each Malaysian to become financially literate at an early age.

Webinar: Estate Planning - Is it a Myth?

22 Aug 2024



Mr. Jason Ng, the speaker of this CPD webinar on the MFPC e-Learning Platform, delved into crucial topics surrounding estate planning and offered actionable strategies that 41 participants could incorporate into their professional practices.

HRDC : Personal Financial & Retirement Planning@Yee Lee Edible Oils Sdn Bhd

11 Sep 2024

This HRDC-claimable programme on Personal Financial and Retirement Planning was held at Yee Lee Edible Oils Sdn Bhd, Ipoh Perak. With 30 participants attending, Dr Zalina Mohd Ishak and Mr Jack Lin Kok Leong shared their in-depth knowledge on financial management and retirement planning strategies.



MFPC@UNIRAZAK x Jobstore.com Campus Career Fair 2024

11 Sep 2024



MFPC secretariat promoted our internship and scholarship programmes at UNIRAZAK x Jobstore.com Campus Career Fair 2024, which saw the participation of over 20 companies.

MFPC@FiMMAC 2024

12 Sep 2024

MFPC participated in FiMMAC 2024, held at The Vertical, Kuala Lumpur. This annual conference organised by the Federation of Investment Managers Malaysia (FiMM) brought together industry leaders, practitioners, and the public. Our delegation participated in the conference, as well as engaged attendees through a physical and virtual booth to promote financial literacy and professional certification programmes.



Mandatory CPD Programme: Retirement Planning

12 September 2024



Our mandatory CPD programme on retirement planning was held via the MFPC e-learning platform. The session was conducted by Dr. Leow Hon Wei and attracted 46 participants.

Tea Talk: Stop Scam and Manage Your Money

21 Sep 2024

MFPC Sabah Chapter hosted a highly engaging tea talk at Sutera Harbour Resort, Sabah. With over 70 registered participants, the event was graced by YB Tan Lee Fat, Assistant Finance Minister II of the state. Esteemed speakers including Mr Sunny Chai, Mr Tonarusli Tonamil, Ms Gracy Nealda, and our very own Ms Chung Kar Yin delivered powerful insights on protecting personal finances and avoiding scams.



MFPC & AFA Sharing Session

25 Sep 2024



The MFPC & AFA Sharing Session was successfully held at the secretariat office and attended by licensed practitioners from ten financial planning companies. The session featured Mr Andy Ng Yen Heng, President of MFPC; Mr John Chan Ninyii, President of AFA; and Mr Alfred Sek, a veteran financial planner, on maximising the CMDF-MFPC Scholarships and Internships Programmes, as well as leading expert discussions on improving firms' competitiveness and talent development.

MFPC@NHCCE 2024

30 Sep - 2 Oct 2024

MFPC participated in the National Human Capital Conference & Exhibition (NHCCE) 2024 at the Malaysia International Trade and Exhibition Centre (MITEC). During the event, MFPC actively engaged with the public to promote financial literacy and showcased its HRDC claimable programmes, emphasising the importance of professional development in financial planning.



MFPC@Principal Business Academy Graduation Day 2024

1 Oct 2024



The secretariat participated in the Principal's Business Academy Graduation Day 2024 held at Courtyard Kuala Lumpur South. Apart from celebrating the achievements of graduates, our delegation also engaged the audience at our exhibition booth to promote professional certifications.

CPD Programme: Islamic Estate Planning for Business Owners

3 Oct 2024

This virtual CPD Programme on Islamic Estate Planning for Business Owners was conducted by Ms Amna Fazillah from as-Salihin Trustee Berhad on the Zoom Events Platform.



Retirement Planning for Youth

5 Oct 2024



This virtual talk was organised in collaboration with Curtin Finance and Investment Club via Zoom Events. The session featured Mr Ang Chee Yong from VKA Wealth Planners and En Husaini Hussien, CEO of Private Pension Administrator (PPA), who provided valuable insights into retirement planning tailored for youth and further equipped attendees with practical strategies for future financial security.

National Dual Training System (SLDN)

7 Oct 2024

MFPC hosted an induction for the National Dual Training System (SLDN) for Trainers at the secretariat's office, bringing together over 40 participants for a dynamic programme that integrated theoretical learning with practical, real-world experience.



MFPC@Invest Smart Fest 2024 Kuala Lumpur

11 – 13 Oct 2024

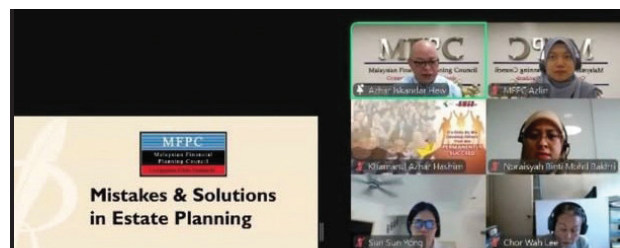


MFPC was part of Securities Commission Malaysia's InvestSmart Fest 2024, which was held at Mid Valley Exhibition Centre, Kuala Lumpur. During the three-day event with the Financial Planning Association of Malaysia, we successfully coordinated one-on-one financial planning consultation sessions with participating licensed financial planners under the #FinPlan4u® initiative.

Mandatory CPD Programme: Mistakes and Solutions in Estate Planning

17 Oct 2024

Mr. Azhar Iskandar Hew, Group CEO of Rockwills Corporation Sdn Bhd conducted the MFPC Virtual Mandatory CPD Programme on Mistakes and Solutions in Estate Planning, which was attended by more than 70 participants.



MFPC-mySalam Programme : Mastering Personal Finance

25 Oct 2024



Haji Rafie Omar shared his insights on income management, budgeting, risk management, and modern financial pitfalls with around 50 participants at the International Islamic University Malaysia (IIUM).

MoA Signing MFPC-Universiti Malaysia Terengganu (UMT) and MFPC CPD Programme

27 Oct 2024

MFPC signed MoA with UMT to provide a professional pathway in financial planning for UMT's Bachelor of Finance undergraduates through our RFP certification. MFPC through our East Coast Chapter, collaborated with UMT to organise a CPD Programme also collaborated with on Planning for Inherited Assets: Taxation and Estate Planning Considerations.



MFPC@Jobstore MyCareerFair

26 – 27 Oct 2024



MFPC Secretariat participated in Jobstore My-CareerFair at the Kuala Lumpur Convention Centre, where we actively promoted our professional certifications, internship, and scholarship programmes to attendees interested in pursuing a professional career in financial planning.

Financial Planning for Professional Bodies e-Roadshow (Sabah)

2 Nov 2024

The third installment of the Financial Planning for Professional Bodies e-Roadshow was held virtually, attracting about 200 participants nationwide. Supported by the Capital Market Development Fund (CMDf), the event offered insightful sessions on financial advisory practices in Malaysia, investment strategies, and retirement planning, delivered by industry experts from three licensed financial planning firms – Mr Ethan Teh of Firmus Financial, Mr John Chan of YES Financial Berhad and Mr Anuar Shuib of VKA Wealth Planners.



Mastering Financial Planning Essentials for Entrepreneurs

9 Nov 2024



Under the National Chapter of UNESCO EE Net Malaysia, MFPC organised a virtual session focusing on essential financial planning skills for entrepreneurship, which attracted over 600 registrations, with participation from more than five universities across Malaysia. The event catered to students, young professionals, and aspiring business owners and featured two distinguished speakers - Mr. Anuar Shuib and Mr. Jordan Peh.

HRDC Programme: Personal Financial & Retirement Planning

15 December 2024

MFPC successfully conducted a one day Personal Financial & Retirement Planning programme, an HRDCorp Claimable Programme, for 22 Petronas staff at Petronas East Coast Complex, Kerteh. Led by Dr. Zalina Mohd Ishak, the session covered essential financial management and retirement planning strategies.



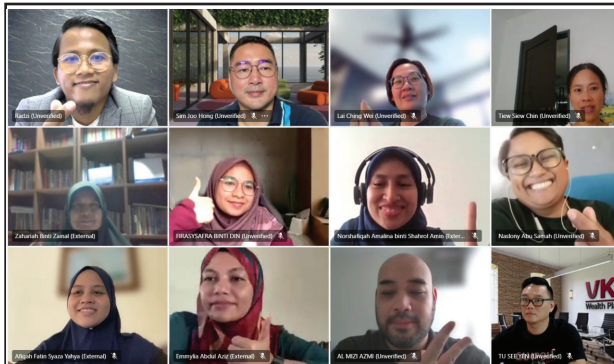
RFP Module 2 Allianz Life Insurance

16 April 2024



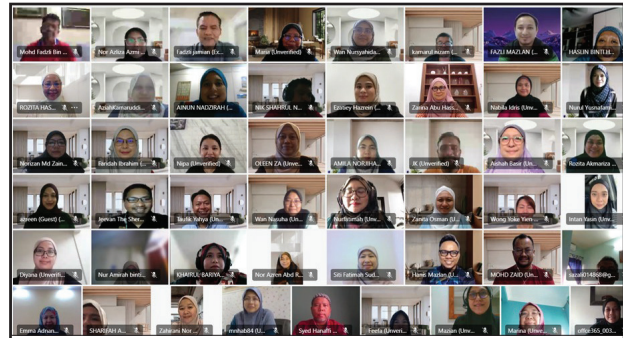
Principal CMDF-MFPC CIRP M6 Class

21 April 2024



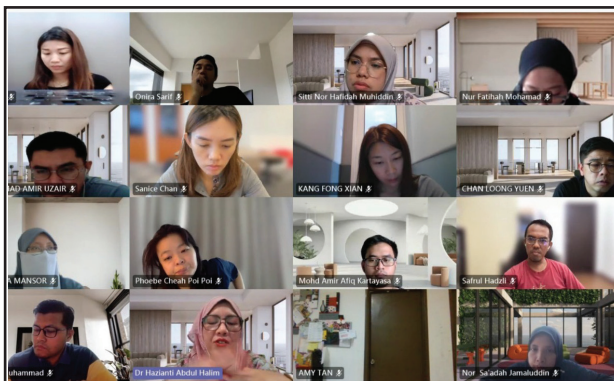
Shariah RFP Capstone

7 May 2024



Certification in Shariah Retirement Planning

28 May 2024



RFP / Shariah RFP Capstone (Combined Class)

3 July 2024



Shariah RFP Capstone

10 Sept 2024



Shariah RFP Capstone

1 Oct 2024



Shariah RFP Capstone

2 Dec 2024



A Premier Financial Planning Designation of MFPC



MyCoID : 0402045

HRD CORP REGISTERED COURSE/
PROGRAMME NO:10001249007



BANK NEGARA MALAYSIA
CENTRAL BANK OF MALAYSIA



Suruhanjaya Sekuriti
Securities Commission
Malaysia

The Shariah RFP Programme is recognised by Bank Negara Malaysia and Securities Commission Malaysia as the approved qualification for Financial Adviser's Licence and Capital Market Services Licence respectively



SHARIAH RFP CAPSTONE PROGRAMME

"A Swift Path Forward to Shariah Financial Planning"



Championship Award
(Islamic Finance Qualifications) 2021 / 22/23
Best Islamic Wealth Management
Qualification 2018/19/20
Championship Award (Advocacy) 2019
Best Islamic Finance Qualification 2016
Best Islamic Finance Education Provider 2015



Best Educational
Institute in Banking
and Insurance 2016
Awards



Honourable Commendation for
Financial Planning Awareness Programs
Wen Hui Award for Educational Innovation 2014



Malaysia's New Economic Model aims to increase the nation's pool of well-trained and educated human capital. It further seeks to address the critical needs for qualified Shariah Financial Planners to position Malaysia as the regional hub for Islamic Finance. The programme is a fast track pathway for participants who successfully pass all the assessments and examinations to be conferred the Shariah RFP designation.



1stMFPC Portal
1st.mfpc.org.my

PROGRAMME OUTLINE

Module 1 - Fundamentals of Shariah Financial Planning

Module 2 - Risk Management & Takaful Planning

Module 3 - Shariah Investment Planning

Module 4 - Zakat & Tax Planning

Module 5 - Shariah Estate Planning

Module 6 - Retirement Planning

Module 7 - Applications in Shariah Financial Planning

Explore two engaging class mode options:

Online Mode: 8 days of immersive learning

or

Hybrid Mode: Experience 4 days online, continued by 3 days of interactive physical sessions.



Scan Here
to Check Schedule

Course Fee

RM2,988.00

Inclusive of 8% SST
(5% Discount of tuition fee for
registered MFPC member only)

- Only softcopy materials will be provided.
- The hardcopy is still available (upon payment) at 40% discount on Standard Rate
- No class recording is available



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TO REGISTER**

ENTRY REQUIREMENTS

- ✓ Minimum 3 years' full-time working experience in a financial related industry and
- ✓ RFP, CFP, CFP (Part 1) or
- ✓ Membership of MIA, MICPA, CPA (Aust.), ACCA, Bar Council, ICSA, MAICSA, CIMA or
- ✓ Relevant PhD, Masters or Bachelor's degree

ASSESSMENTS :

Project paper on Shariah Financial Plan & 100 Questions (MCQ)

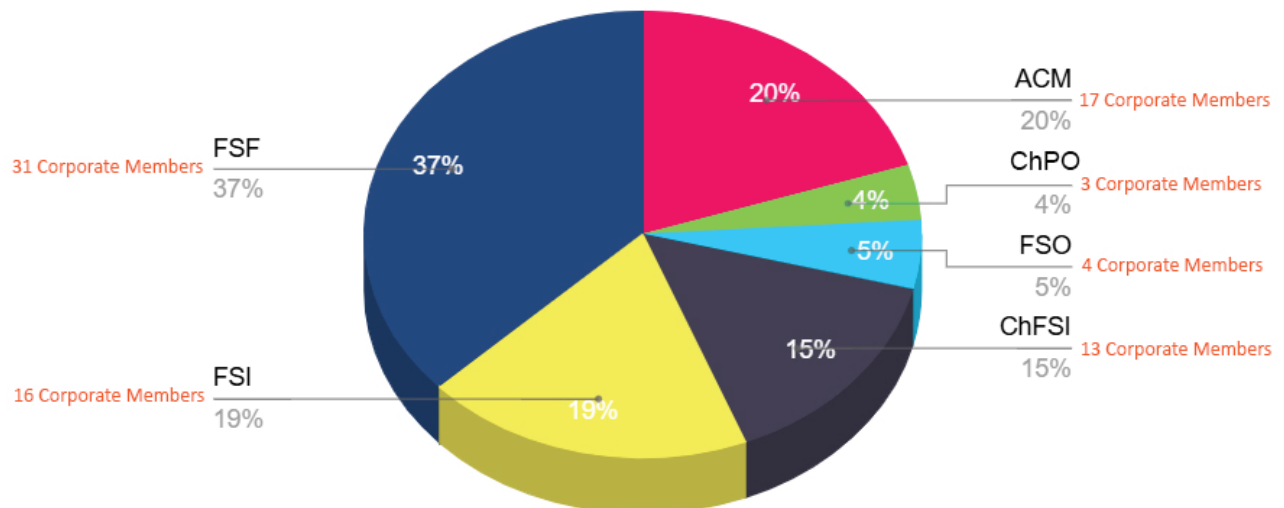


For enquiries, please contact :
Education and Examination Department
Call : +603 - 6203 5899
Email : education@mfpc.org.my

MFPC MEMBERSHIP IN 2024

CORPORATE MEMBERS

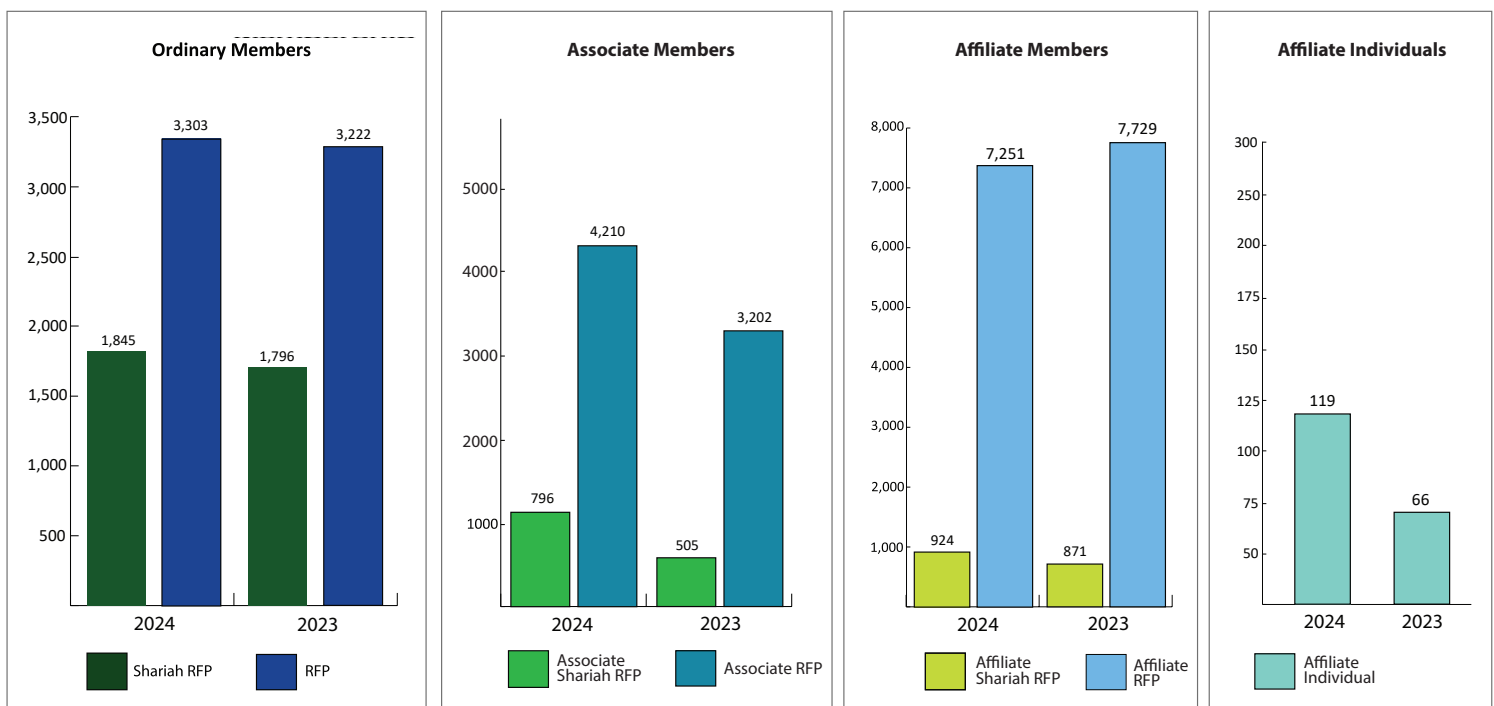
Total Corporate Members: 84



ChPO (Charter Promoter Organisation)
 FSO (Financial Services Organisation)
 ChFSI (Charter Financial Services Institution)
 FSI (Financial Services Institution)

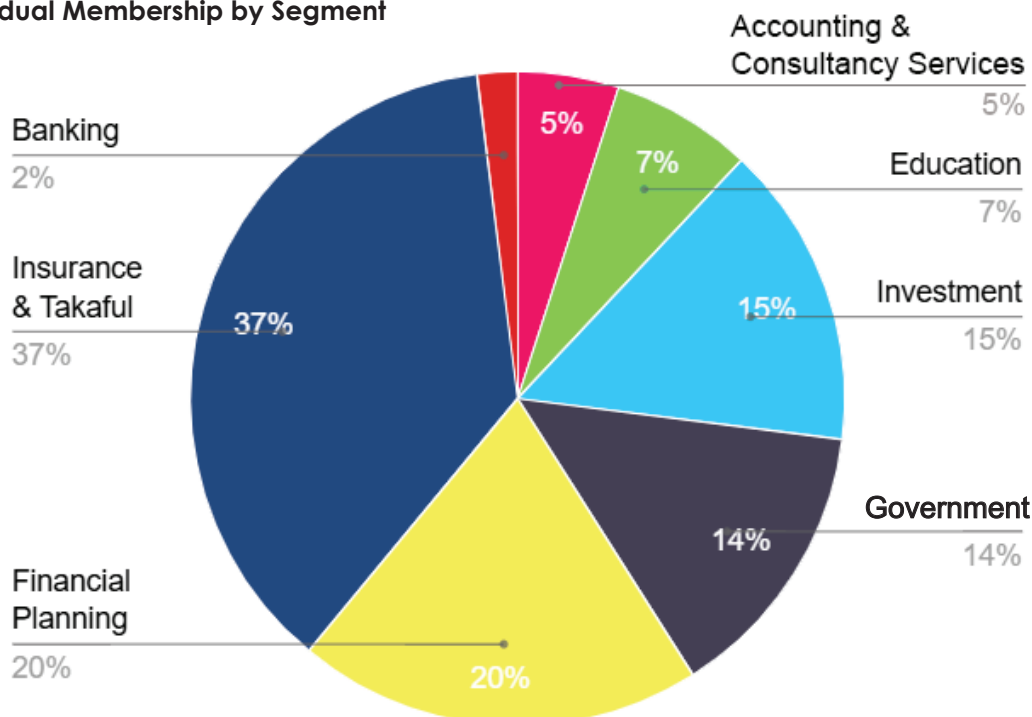
FSF (Financial Services Firm)
 ACM (Affiliate Corporate Member)

INDIVIDUAL MEMBER



MFPC MEMBERSHIP IN 2024

Individual Membership by Segment



1st MFPC

RFP
Your Pathway
to Professionalism

RFP
A Premier Financial Planning
Designation of MFPC

Please login to 1st MFPC Portal by clicking the link :

<https://1st.mfpc.org.my>

MFPC members shall login to 1st MFPC Portal at <https://1st.mfpc.org.my>. This portal is a self-service portal that gives you easy and instant access to the following:-

- Update personal profile & contact
- Update latest employer details
- Attach & update latest education level
- Register online for classes & Examinations
- View & print exam result
- View, print & submit CPD report
- Register online for seminars / CPD Programmes
- Renew membership
- View & print certificate
- e-Badge
- e-ID verification
- Verify membership status and print confirmation letter
- Make payment via IPAY88 gateway
- View & print invoice/official receipt

LIST OF MFPC ENDORSED CPD PROGRAMMES 2024

MFPC has endorsed a number of financial events to facilitate members' fulfilment of the 30 CPD credit hours required for the renewal of membership.

No.	Date	Activity	Organiser / Coorganiser	CPD Hours
JANUARY				
1	3-Jan-24	YES Financial Kick Off & Seminar 2024	Yes Financial Berhad	8
2	6-Jan-24	What & Where to Invest 2024	IFAST Capital Sdn Bhd	8
3	11-Jan-24	Beginner Guide to Blockchain & Cryptocurrency	MFPC	3
4	13-Jan-24	2024 VKA Q1 Conference	VKA Wealth Planners Sdn Bhd	8
5	26-Jan-24	FAA Spring Conference 2024	FA Advisory Sdn Bhd	6
6	29-Jan-24	Financial Planning 101	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	6
FEBRUARY				
7	6-Feb-24	Fundamental of Financial Planning – Financial Statement Analysis	MFPC	6
8	6-Feb-24	IFAST Monthly Morning Meeting - February'24	IFAST Capital Sdn Bhd	3
9	20-Feb-24	IFAST CNY Open House - 2024	IFAST Capital Sdn Bhd	3
10	24-Feb-24	Financial Planning for Professionals Roadshow	MFPC	3
MARCH				
11	2-Mar-24	My Money & Me (Selangor)	MFPC	4
12	6-Mar-24	2024 Kick Off Conference	Bill Morrisons Wealth Management Sdn Bhd	8
13	7-Mar-24	Holistic Legacy Planning	MFPC	3
14	9-Mar-24	SustainUnity: The LIONS & LIFE ESG Virtual Summit	VKA Wealth Planners Sdn Bhd	2
15	16-Mar-24	Retirement Planning E-Workshop 2024 (Centre Region)	MFPC	1
16	21-Mar-24	Risk Management & Insurance Planning	MFPC	6
APRIL				
17	1-Apr-24	Self-Paced e-CPD Programme The Virtual Industry: Professionalism & Ethics Forum 2023	MFPC	4
18	1-Apr-24	Self-Paced Shariah RFP Module 2: Risk Management & Takaful Planning	MFPC	15
19	2-Apr-24	IFAST Monthly Morning Meeting - April'24	IFAST Capital Sdn Bhd	3
20	4-Apr-24	E-Filing + E-Invoicing Management Workshop	MFPC	3
21	13-Apr-24	2024 VKA Q2 Conference (Zoom)	VKA Wealth Planners Sdn Bhd	8
22	16-Apr-24	ESTATE PLANNING MISTAKES AND SOLUTIONS [Part 1]	Rockwills Business Solutions Sdn. Bhd.	3
23	17-Apr-24	HRDC Public Programme: Fundamentals of Investment Planning	MFPC	6
24	24-Apr-24	ESTATE PLANNING MISTAKES AND SOLUTIONS [Part 1] (CN)	Rockwills Business Solutions Sdn. Bhd.	3
25	25-Apr-24	Professional Development Day 1/2024	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	6
26	27-Apr-24	My Money & Me (Pulau Pinang)	MFPC	4
27	27-Apr-24	Insurance Day Bill Morrisons	Bill Morrisons Wealth Management Sdn Bhd	7
28	29-Apr-24	Legacy Planning	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	6
29	30-Apr-24	Challenges in Islamic Finance: Fraud and Crisis	MFPC	3
30	30-Apr-24	Plan Writing Express Workshop 2024	Phillip Mutual Berhad	8

No.	Date	Activity	Organiser / Coorganiser	CPD Hours
MAY				
31	1-May-24	Self-Paced e-CPD Programme – Accounting: The Lingua Franca of Financial Planners	MFPC	3
32	6-May-24	I-Max Financial Internal Training Programme	I-Max Financial Sdn Bhd	8
33	7-May-24	IFAST Monthly Morning Meeting - May'24	IFAST Capital Sdn Bhd	3
34	16-May-24	11th MFPC Conference on Shariah Wealth Management & Financial Planning in Conjunction with MFPC 20th Anniversary Luncheon	MFPC	4
35	18-May-24	Retirement Planning for Youth e-Workshop	MFPC	1
36	18-May-24	Certified Professional in Taxation	TST Consultants Sdn Bhd	14
37	23-May-24	Estate Planning Mistakes and Solutions (CN) - Part 2	Rockwills Business Solutions Sdn. Bhd.	3
38	23-May-24	ADVANCE FIN ADVISORY 2024 ERIC TSU COACHING PROGRAM- DAY 1	Advance Fin Advisory Sdn Bhd	0
39	23-May-24	ADVANCE FIN ADVISORY 2024 ERIC TSU COACHING PROGRAM- DAY 1	Advance Fin Advisory Sdn Bhd	4
40	24-May-24	ADVANCE FIN ADVISORY 2024 ERIC TSU COACHING PROGRAM- DAY 2	Advance Fin Advisory Sdn Bhd	4
41	27-May-24	Estate Planning Mistakes and Solutions (EN) - Part 2	Rockwills Business Solutions Sdn. Bhd.	3
42	30-May-24	Construction of KYC & Financial Planning	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	6
JUNE				
43	4-Jun-24	IFAST Monthly Morning Meeting - Jun'24	IFAST Capital Sdn Bhd	3
44	5-Jun-24	HRDC Public Programmes : Fundamentals of Retirement	MFPC	6
45	6-Jun-24	Investment Planning (Module 3)	MFPC	6
46	11-Jun-24	ADVANCE FIN ADVISORY 2024 ERIC TSU COACHING PROGRAM- DAY 3	Advance Fin Advisory Sdn Bhd	4
47	13-Jun-24	Estate Planning Mistakes and Solutions (EN) - Part 3	Rockwills Business Solutions Sdn. Bhd.	3
48	24-Jun-24	Estate Planning Mistakes and Solutions (CN) - Part 3	Rockwills Business Solutions Sdn. Bhd.	3
49	26-Jun-24	Portfolio Construction and ETF Investing, Amla & Anti-Terrorism Financing, Overview of General and Life Insurance, Code of Ethics and Regulations for Financial Advisor.	Legacy Advisory Sdn Bhd	8
50	27-Jun-24	Sustainable Financial Planning Practise and Transforming Product Selling to Financial Advisory	MFPC	3
51	29-Jun-24	My Money & Me (Taiping)	MFPC	4
JULY				
52	4-Jul-24	Tax Planning (Individual)	MFPC	6
53	6-Jul-24	PhillipCapital 14th Investment Conference 2024 - "Harnessing Opportunity Amidst New Global Geopolitics"	Phillip Mutual Berhad	8
54	9-Jul-24	IFAST Monthly Morning Meeting - Jul'24	IFAST Capital Sdn Bhd	3
55	13-Jul-24	Advance Fin Advisory 2024 Retirement Planning Conference	Advance Fin Advisory Sdn Bhd	4
56	20-Jul-24	Financial Planning for Professionals Roadshow	MFPC	3
57	23-Jul-24	13th AFA Annual Conference 2024 - Client Centric Advising	Association Of Financial Advisers (AFA)	7

LIST OF MFPC ENDORSED CPD PROGRAMMES 2024

No.	Date	Activity	Organiser / Coorganiser	CPD Hours
58	25-Jul-24	5X Your Financial Advisory Income Through Financial Coaching	MFPC	6
59	25-Jul-24	Practical Guide to Securing Family Business Succession Cases	Rockwills Business Solutions Sdn. Bhd.	8
60	25-Jul-24	Fundamentals of Retirement Planning	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	6
61	27-Jul-24	My Money & Me (Johor Bharu)	MFPC	4
62	29-Jul-24	Professional Development Day 2/2024	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	7
AUGUST				
63	6-Aug-24	iFAST Monthly Morning Meeting - Aug'24	iFAST Capital Sdn Bhd	3
64	10-Aug-24	2024 VKA Q3 Conference (Zoom)	VKA Wealth Planners Sdn Bhd	4
65	14-Aug-24	FAA MY Conference 2024	FA Advisory Sdn Bhd	6
66	17-Aug-24	My Money & Me (Kelantan)	MFPC	4
67	22-Aug-24	Estate Planning – is it a Myth?	MFPC	6
68	22-Aug-24	Investment Planning Course	iFAST Capital Sdn Bhd	8
69	27-Aug-24	UNITY TRUST BERHAD WROKSHOP	Phillip Mutual Berhad	7
SEPTEMBER				
70	1-Sep-24	Self-Paced Shariah RFP Module 2: Risk Management & Takaful Planning	MFPC	15
71	3-Sep-24	iFAST Monthly Morning Meeting - Sep'24	iFAST Capital Sdn Bhd	3
72	7-Sep-24	Supercharge Your Due Diligence Skills Part 2	TSI Wealth Planners Sdn Bhd	4
73	7-Sep-24	Supercharge Your Due Diligence Skills Part 2	TSI Wealth Planners Sdn Bhd	4
74	12-Sep-24	Retirement Planning	MFPC	6
75	21-Sep-24	Certified Professional in Taxation	TST Consultants Sdn Bhd	14
76	21-Sep-24	MFPC Tea Talk : Stop Scam and Manage Your Money (Physical in Sabah)	MFPC	4
77	25-Sep-24	Sharing Sessions: Building the Future Together - How FP Firms Can Effectively Leverage the CMDP-MFPC Scholarship & Internship Programmes to Attract Top Talents & Drive Long Term Success.	MFPC	2
78	26-Sep-24	Financial Planning 101	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	6
OCTOBER				
79	3-Oct-24	Islamic Estate Planning for Business Owner	MFPC	3
80	5-Oct-24	My Money & Me (Sarawak)	MFPC	4
81	5-Oct-24	Retirement Planning for Youth e-Workshop	MFPC	1
82	8-Oct-24	iFAST Monthly Morning Meeting - Oct'24	iFAST Capital Sdn Bhd	3
83	16-Oct-24	Mistakes and Solutions in Estate Planning	Rockwills Business Solutions Sdn. Bhd.	8
84	16-Oct-24	Plan Writing Express Workshop 2024	Phillip Mutual Berhad	8
85	17-Oct-24	Mistakes and Solutions in Estate	MFPC	6
86	19-Oct-24	2024 VKA Q4 Conference	VKA Wealth Planners Sdn Bhd	4
87	21-Oct-24	Professional Development Day 3	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	8
88	22-Oct-24	FAA Using the Core-Satellite Approach in Portfolio Asset Allocation	FA Advisory Sdn Bhd	7

No.	Date	Activity	Organiser / Coorganiser	CPD Hours
89	27-Oct-24	Planning for Inherited Assets: Taxation and Estate Planning	MFPC	3
90	28-Oct-24	Fundamentals of Shariah in Islamic Finance (FOSIF)	IBFIM	8
91	28-Oct-24	Continuous Learning Programme(CLeP)	IBFIM	15
NOVEMBER				
92	1-Nov-24	Self-Paced e-CPD Programme – Accounting: The Lingua Franca of Financial Planners	MFPC	3
93	2-Nov-24	Financial Planning for Professionals Roadshow	MFPC	3
94	5-Nov-24	iFAST Monthly Morning Meeting - Nov'24	iFAST Capital Sdn Bhd	3
95	15-Nov-24	Advance Fin Advisory 2024 Eric Tsu Coaching Program- Day 4	Advance Fin Advisory Sdn Bhd	8
96	18-Nov-24	Annual Compliance Workshop 2024	Yes Financial Berhad	4
97	25-Nov-24	Construction of KYC & Financial Planning	UOB Kay Hian Wealth Advisors (M) Sdn Bhd	6
98	26-Nov-24	2024 Compliance Briefing	iFAST Capital Sdn Bhd	3
99	28-Nov-24	The Virtual Industry Forum: Professionalism & Ethics Forum 2024 "Ethical Governance in Emerging	MFPC	4
DECEMBER				
100	2-Dec-23	iFAST Monthly Morning Meeting - Dec'24	iFAST Capital Sdn Bhd	3
101	6-Dec-23	2024 E-Learning Module on Money Laundering and Terrorism Financing	Bill Morrisons Wealth Management Sdn Bhd	4
102	13-Dec-23	Kick Off 2025	Capspring Tematik Financial Group Sdn Bhd	8
103	17-Dec-24	Mistakes and Solutions in Estate Planning	MFPC	6



Clause (8)

Proxy Form

I, _____ Membership No: _____
of _____
hereby appoint* _____ Membership No: _____
of _____

or failing him/her, the *Chairman of the Meeting, as my proxy to vote for me at the 21st Annual General Meeting of the Council to be held on the 24th June 2025.

No.	RESOLUTIONS	FOR	AGAINST
1.	To receive and approve the minutes of the 20 th Annual General Meeting.		
2.	To receive the Treasurer's Report and the Audited Accounts for the year ended 31st December 2024.		
3.	To receive the Secretary's Report for the year ended 31 st December 2024.		
4.	To re-appoint Azman, Wong Salleh & Co as the Auditors of the Council to hold office until the conclusion of the next Annual General Meeting and to authorise the National Council to fix their remuneration.		
5.	To conduct the 10th MFPC Election Proceedings.	Election by ballot paper	
6.	To transact any other business which may properly be transacted at an Annual General Meeting for which due notice of 30 days shall have been given by virtue of clause 9-10 of the Constitution.		

*Strike out whichever is not applicable.

Please indicate with "X" how you wish your vote to be cast. Unless otherwise instructed, the proxy may vote as he thinks fit.

Signed this _____ day of _____ 20 _____

Signature _____



Notes:

Voting Members may appoint a proxy to attend and vote at any general meeting of the Council on his or her behalf. The instrument appointing a proxy shall be in writing and signed by the Member appointing the proxy. A proxy shall be a Member of the MFPC. A Member, except the Chairman of the Meeting, shall not be entitled to represent more than one (1) Member as his or her proxy. To be valid, Proxy Form must be completed and deposited with the Secretariat at Unit 22.7, Level 22, Mon't Kiara (1MK), No. 1 Jalan Kiara, Mont Kiara, 50480 Kuala Lumpur not less than seventy-two (72) hours before the time of the meeting. **(Please download Proxy Form at MFPC at MFPC home page; www.mfpc.org.my).**

Corporate Members

Chartered Promoter Organisation (ChPO)



Chartered Financial Services Institution (ChFSI)



Financial Services Institution (FSI)



Financial Services Firm (FSF)



Affiliate Corporate Members





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MFPC

Malaysian Financial
Planning Council

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Malaysian Financial Planning Council (MFPC)

Unit 22.7, Level 22, Menara One Mont' Kiara (1MK),
No.1 Jalan Kiara, Mont' Kiara, 50480 Kuala Lumpur

Tel: 03-6203 5899

Email: mfpc@mfpc.org.my Website: www.mfpc.org.my

www.mfpc.org.my