

# PITA INFO DECK

**2026**

A photograph of three business professionals in a modern office setting. A man in a dark suit is shaking hands with a woman in a black blazer and white shirt, who is also shaking hands with another man in a dark suit. They are all smiling and looking at each other. The background is blurred, showing office buildings.

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



# Introduction

*Malaysian Financial Planning Council (MFPC) is an independent professional body set up in 2004 with the **objective** of promoting nationwide development and enhancement of the financial planning profession in Malaysia*

## The Big Idea

“All financial professionals should be equipped with financial planning knowledge given the trend towards increased convergence in the financial services industry.”

*YBhg. Tan Sri Dato' Sri Dr Zeti Akhtar Aziz  
Former Governor of Bank Negara Malaysia (BNM)*





Recognized by:



**BANK NEGARA MALAYSIA**  
CENTRAL BANK OF MALAYSIA



**Suruhanjaya Sekuriti**  
Securities Commission  
Malaysia



## 2 Professional Programmes Offered by MFPC



**Your Pathway  
to Professionalism**

**Registered Financial Planner  
(RFP)**



**A Premier Financial Planning  
Designation of MFPC**

**Shariah Registered Financial Planner  
(Shariah RFP)**

# RFP Modules



**Your Pathway  
to Professionalism**

**Module 1**

**Fundamentals of Financial Planning**

**Module 2**

**Risk Management and Insurance Planning**

**Module 3**

**Investment Planning**

**Module 4**

**Zakat and Tax Planning**

**Module 5**

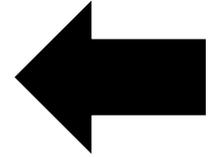
**Estate Planning**

**Module 6**

**Retirement Planning**

**Module 7**

**Applications in Financial Planning**



PITA  
compliance  
module

# Shariah RFP Modules



**A Premier Financial Planning  
Designation of MFPC**

**Module 1**

**Fundamentals of Shariah Financial Planning**

**Module 2**

**Risk Management and Takaful Planning**

**Module 3**

**Shariah Investment Planning**

**Module 4**

**Zakat and Tax Planning**

**Module 5**

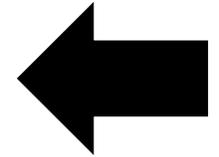
**Shariah Estate Planning**

**Module 6**

**Retirement Planning**

**Module 7**

**Applications in Shariah Financial Planning**



PITA  
compliance  
module

# PITA EXAMINATION FACILITATORS (PEFs)



## Asian Institute of Insurance (Aii)

1. PITA Conventional M2 (for single-license insurance agents)
2. PITA Dual M2 (for dual-license agents who serve the insurance and takaful sectors)
3. Exam Mode: Virtual Computer-Based (VCB) and Remote Proctored Exam (RPE)

Registration: <https://www.mii4u.org/ilms/user/login>

For assistance: Ms Samsina | 03-27128882 | email: [agentexam@aiasia.org](mailto:agentexam@aiasia.org)

## Malaysian Takaful Association (MTA)

1. PITA Shariah M2 (for single-license takaful agents)
2. Exam Mode: Virtual Computer-Based (VCB)

Registration link: <https://www.takafuleexam.com/introduction/index>

For assistance: M2 Admin | 03-22766786 | email: [m2admin@malaysiantakaful.com.my](mailto:m2admin@malaysiantakaful.com.my)



# PITA Learning Materials



Exam	Module Title	Language			
		E-Book	Video	Practice Question	Lecture Slides
<b>PITA Conventional M2</b>	Risk Management and Insurance Planning	English Mandarin	English Mandarin	English Mandarin	English Mandarin
<b>PITA Shariah M2</b>	Risk Management and Takaful Planning	English Bahasa Malaysia	English Bahasa Malaysia	English Bahasa Malaysia	English Bahasa Malaysia

# PITA Examination Format

## NOTE:

1. **VCBE** = with live human invigilators monitoring the exam session
2. **RPE** = AI system monitoring automatically without any live human invigilators present
3. The **result slip** serves as an official proof of 30 CPD attainment
4. Must score **50%** to pass

Exam Code	Format	Mode	Language	Note
PITA Conventional M2	75 MCQs (2 hours)	Virtual Computer-Based Exam (VCBE)	English Mandarin	Exam frequency: refer to Aii's website Language: must be selected before the start of exam
PITA Dual M2	100 MCQs (2½ hours)	Remote-Proctored Exam (RPE)	English	Exam frequency: refer to Aii's website To pass overall: Session A: 50 RFP CM2 MCQs, at least 25 questions must be answered correctly Session B: 50 Shariah RFP M2 MCQs, at least 25 questions must be answered correctly
PITA Shariah M2	75 MCQs (2 hours)	Virtual Computer-Based Exam (VCBE)	English Bahasa Malaysia	Exam frequency: refer to MTA's website There is a flexibility to switch between English and BM at any point during the exam Ad hoc examination can be arranged by ITOs for bulk registration

# PITA Examination Fees

Exam	Fee (RM)					
	NEW		RESIT (till 31 May 2026)		RESIT (effective 01 June 2026)	
	Individual Registration	Bulk Registration (via ITO)	Individual Registration	Bulk Registration (via ITO)	Individual Registration	Bulk Registration (via ITO)
PITA Conventional M2	200	200	0	0	100	100
PITA Dual M2	280	280	0	0	140	140
PITA Shariah M2	200	200	0	0	100	100

## Important:

1. Unlimited complimentary examination resits will cease on 31 MAY 2026.
2. Effective 01 June 2026, candidates will be entitled to two (2) complimentary resits only. Upon full utilization of these two complimentary resits, a resit fee of RM100 per attempt will be applicable. For candidates pursuing dual qualification, a resit fee of RM140 per attempt will apply after the two complimentary resits have been fully utilized.



# PITA EXAMINATION BOOTCAMP (complimentary)

## Note:

Five (5) complimentary tutorial sessions are offered to qualified candidates (newly registered and those who failed) one week prior to each session. Invitations will be sent by MFPC.

## Recommendation to ITO:

Advise agents to complete the PITA requirement by November 2026 at the latest, allowing them to focus fully on December's critical sales period without exam-related distractions.

Session	Date	Time	Language
1	04 April 2026 (Saturday)	10am to 1pm	PITA M2: English & Mandarin (combined) PITA Shariah M2: English & BM (combined)
2	02 May 2026 (Saturday)	10am to 1pm	PITA M2: English & Mandarin (combined) PITA Shariah M2: English & BM (combined)
3	04 July 2026 (Saturday)	10am to 1pm	PITA M2: English & Mandarin (combined) PITA Shariah M2: English & BM (combined)
4	05 September 2026 (Saturday)	10am to 1pm	PITA M2: English & Mandarin (combined) PITA Shariah M2: English & BM (combined)
5	07 November 2026 (Saturday)	10am to 1pm	PITA M2: English & Mandarin (combined) PITA Shariah M2: English & BM (combined)

# MFPC PITA M2 (Course + Exam)

## (physical mode ONLY)

Structure	Fee Payable to MFPC	Roles
Programme	<b>2-Day Programme Fee:</b> RM12,000	<b>Roles of ITO:</b> <ol style="list-style-type: none"> <li>1. Appoint ONE (1) point of contact (PIC) to assist the trainer</li> <li>2. Secure a suitable training venue</li> <li>3. Arrange meals for participants (morning tea, lunch, afternoon tea; optional)</li> <li>4. Submit registration template to MFPC (template to be provided by MFPC)</li> <li>5. Share learning materials provided by MFPC with participants prior to the training</li> <li>6. Monitor class attendance on both Day 1 and Day 2</li> </ol> <b>Roles of MFPC:</b> <ol style="list-style-type: none"> <li>1. Appoint trainer</li> <li>2. Provide e-learning materials (e-books, e-lecture slides and e-practice questions) to ITO to be shared with participants</li> <li>3. Administer examination related matters that include constructing, formatting and printing of examination questions, preparing of answer sheets, appointing invigilator (1 invigilator = 40 pax), verifying examination attendees, invigilating, marking, result tabulation, analysis and approval</li> <li>4. Release of results to ITO (within 5 working days after the examination date)</li> <li>5. Issue certificate of completion to participants (within 10 working days after the examination date)</li> <li>6. Submit results to LIAM / MTA for regulatory reporting purposes</li> </ol>
Examination	<b>Examination Fee:</b> RM200 per participant  <b>Travel and Accommodation Charges for Trainer (if applicable):</b> <ul style="list-style-type: none"> <li>• <i>West Malaysia (outside Klang Valley): A flat rate of RM1,000 per trainer will be charged (up to 100 participants)</i></li> <li>• <i>East Malaysia (Sabah and Sarawak): A flat rate of RM2,000 per trainer will be charged (up to 100 participants)</i></li> </ul>	

# What's Next After PITA M2?

## Professional Titles for RFP / Shariah RFP Modular Certification Programmes

CONVENTIONAL RFP	
Module	Professional Certification Title
Module 2: Risk Management and Insurance Planning	Professional Insurance Adviser (PIA)
Module 3: Investment Planning	Professional Investment Planning Adviser (PIPA)
Module 4: Zakat and Tax Planning	Professional Tax Planning Adviser (PTPA)
Module 5: Estate Planning	Professional Estate Planning Adviser (PEPA)
Module 6: Retirement Planning	Professional Retirement Planning Adviser (PRPA)

SHARIAH RFP	
Module	Professional Certification Title
Module 2: Risk Management and Takaful Planning	Professional Takaful Adviser (PTA)
Module 3: Shariah Investment Planning	Professional Shariah Investment Planning Adviser (PSIPA)
Module 4: Zakat and Tax Planning	Professional Zakat and Tax Planning Adviser (PZTPA)
Module 5: Shariah Estate Planning	Professional Shariah Estate Planning Adviser (PSEPA)
Module 6: Retirement Planning	Professional Shariah Retirement Planning Adviser (PSRPA)

Please note that:

1. Professional titles are only given upon passing Module 1 **AND** any one module from Module 2 to Module 6
2. Professional titles are given to Module 2 to Module 6 only
3. No professional titles are given to Module 1 (fundamental and non-specialized paper) and Module 7 (practical and non-specialized paper)
4. Must be active members of MFPC

# Tingkatkan Masa Depan Kewangan Anda dengan **PITA**

Daftar sekarang:

**Labur dan Kembangkan Kerjaya Anda!**



# Thank You

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