

PITA INFO DECK

2026



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

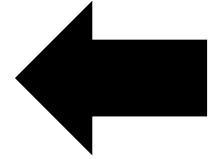
Estate Planning

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

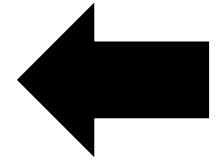
Shariah Estate Planning

Module 6

Retirement Planning

Module 7

Applications in Shariah Financial Planning



PITA
compliance
module

PITA EXAMINATION FACILITATORS (PEFs)

PEF	Type of PITA Exam Conducted
 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 (RP) Registration: https://www.mii4u.org/ilms/user/login For assistance: Ms Samsina 03-27128882 email: agentexam@aiaasia.org
 MTA	1. PITA Shariah M2 (for single-license takaful agents) 2. PITA Dual M2 (for dual-license agents who serve the takaful and insurance sectors) 3. 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

PITA Learning Materials



Exam	Module Title	Language			
		E-Book	Video	Practice Question	Lecture Slides
PITA Conventional M2	Risk Management and Insurance Planning	English Mandarin	English Mandarin	English Mandarin	English Mandarin
PITA Shariah M2	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)		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 (a)

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

PITA Examination Fees (b)

The PITA unlimited free resit examination arrangement ended on **31 May 2026**. Effective **01 June 2026**, the resit examination fees will apply as summarized below:

CATEGORY A:

1st time attempt exam: on or before 31 MAY 2026

1. Resit Exam = unlimited FOC (01 January 2025 to 31 May 2026)
2. After 31 May 2026 = resit exam fee is RM100 (single-license) / RM140 (dual-license) per sitting

CATEGORY B:

1st time attempt exam: on or after 01 JUNE 2026

1. Resit Exam = 2 FOC (01 June 2026 to 31 December 2026)
2. Subsequent resit exam = RM100 (single-license) / RM140 (dual-license) per sitting



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)

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

Malaysian Financial Planning Council (MFPC)
Unit 22.7, Level 22, Menara One Mont' Kiara (1MK), No.1 Jalan Kiara, Mont' Kiara, 50480 Kuala Lumpur, Malaysia

Telephone : +603-6203 5899

Email : mfpc@mfpc.org.my

Website : <https://www.mfpc.org.my/>

Facebook : <https://www.facebook.com/MFPCSecretariat/>