MFPC
Malaysian Financial Planning Council
Competence.Ethics.Standards

REGISTERED RFP FINANCIAL PLANNER™
YOUR PATHWAY TO PROFESSIONALISM

Registered Financial Planner (RFP) Capstone Programme

"A Swift Path Forward to RFP Designation"

In line with Malaysia New Economic Roadmap to increase a pool of well-trained and educated human capital in Malaysia and to address the critical need for qualified Financial Planners as to position Malaysia as the regional hub for Banking and Finance, MFPC has designed a 6 days RFP Capstone programme which is a fast track pathway for Senior Executive and Regulators in the Financial Services Industry, for example Bank Negara, Securities Commission, Inland Revenue Board of Malaysia, Employees Provident Fund, Financial Services Institutions and Higher Learning Institution. Participants of RFP Capstone programme who has successfully passed all the assessment shall be conferred with RFP designation.

Day 1
- Financial Planning Environment, Phenomenon & Process
- The regulatory environment for Financial Planners
- Ethics & Professionalism
- Personal Financial Statements
- The Economic Environment and its Impact on Financial Planning
- Cash Flow Management
- Risk Management & Life Insurance Planning
- Estate Planning Issues, Process, Personalities and Instruments
- Retirement Planning Tools & Processes
- Risk Management
- Insurance Need Analysis
- Annuities
- General Insurance Product in Insurance Planning
- Legal Principles and relevant legislation in Insurance
- Consumer Protection and Life Insurance Industry Code of Practice

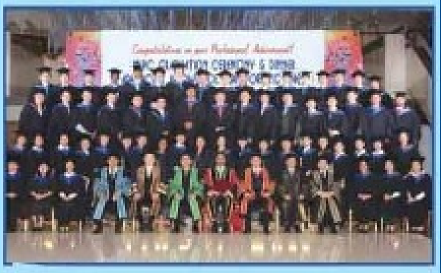
Day 2
- Quantitative Techniques in Investment
- Financial Statement Analysis
- Investment is Share Market
- Basic of Equity Valuation
- Technical Analysis
- Derivatives Securities
- Unit Trust & Real Estate
- Basic Concepts of Portfolio Management

Day 3
- Introduction to Malaysian Income Taxation
- Computation of Chargeable income – the basic format
- Employment & Investment Income
- Business Taxation
- Taxation of Individuals
- Taxation of Partnership
- Taxation of Companies
- Taxation of Trust, Estates & Settlements
- Overview of Zakat
- Types of Zakat
- Zakat Calculation
- Zakat and Income Tax
- Zakat and Tax Planning

Day 4
- Understanding Estate Planning
- Testacy & Intestacy
- Trusts
- Powers of Attorney
- Personal Representatives – Duties & Powers
- Estate Planning for Business Owners
- Retirement Issues & Process
- Approaches for Determining the Requires Retirement Capital
- Risk and "Risk Profiling" in Retirement Planning
- Investment Basics and Strategies in Retirement Planning
- Construction and Management of Retirement Portfolio
- Strategy to Meet Shortfalls in Retirement Capital
- Retirement Schemes for Individuals
- Managing Consumption Credits in Retirement Planning
- Debt Management in Retirement Planning

Day 5 & 6
- Financial Planning Process: An Overview
- Client-Financial Planner Relationship
- Data Gathering I: Legal Aspects & Process
- Data Gathering II: Setting Clients Goals, Objectives & Priorities
- Analyses of Client's Data & Strategic Issues
- Financial Plan Preparation
- Financial Plan Implementation
- Financial Plan: Monitor & Review
- Example of a Comprehensive Financial Plan

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



Objectives
- To increase a pool of Professional Financial Planners in the Capital Market throught training and education
- To provide a qualification that will equip candidates with a comprehensive and practical understanding of financial planning
- To update participants with current innovative financial planning tools
- To elevate Financial Planning Literacy

10% discount for MFPC members

Recognition
RFP Programme is recognised by BANK NEGARA MALAYSIA and Suruhanjaya Sekuriti as the approved qualification for Financial Advisor Licence and Capital Market Services Licence respectively.

Course Fee: RM2,500 For enquiry please contact: Mr. Lansius at 088-487 311

RFP REGISTERED FINANCIAL PLANNER ™

YOUR PATHWAY TO PROFESSIONALISM

The Registered Financial Planner (RFP) was introduced and launched by the Governor of Bank Negara Malaysia, YBhg. Tan Sri Dr. Zeti Akhtar Aziz in 2002.

RFP designation is recognised by **Bank Negara Malaysia** and **Securities Commission Malaysia** for Financial Adviser (FA) Licence & FA Representative Licence and Capital Markets Services Licence (CMSL) & CMSL Representative Licence respectively.

RFP RECOGNISED BY REGULATORS

MFPC confers

Registered Financial Planner (RFP)

The premier financial planning mark of excellence

Bank Negara Malaysia - Insurance Act (Amendment) 2005

RFP is an approved qualification for the application of Financial Adviser (FA) Licence & FA Representative Licence

Securities Commission Malaysia - Capital Markets and Services Act 2007

RFP is an approved qualification for the application of Capital Markets Services Licence (CMSL) & CMSL Representative Licence

RFP Module :

- 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**

Each Module requires a minimum of 42 lecture hours

Exemptions

RFP designees can apply for Shariah RFP Module 4 and 6 exemptions.

Affiliate RFP

MODULE 1 **Fundamentals of Financial Planning**

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One other module of the RFP Programme

MFPC Malaysian Financial Planning Council

Malaysian Financial Planning Council (MFPC)
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