

ISLAMIC Financial Planner



A Professional Qualification by



Recognised by



BANK NEGARA MALAYSIA

Accredited by:



Islamic Financial Planner (IFP) is designed specially for professionals and personnel serving the retail segment of the Islamic financial products and growing demands of discerning Muslim retail clientele call for higher standards of competency and ethical practice of financial planning professionals. Islamic Financial Planner shall be equipped with all the necessary knowledge of financial advisory for the retail market.

Learning Outcomes

Upon completion of this advanced level, participants would attain a complete knowledge and have standard proficiency as Islamic finance professional. Their professionalism can be measured through their ability to:

- guide clients through the comprehensive financial planning process.
- advise clients on how they may achieve their financial goals according to Shariah and Al-Falah.
- implement and monitor the holistic financial plan for the client.

Entry Requirement

- Full Fledged (all Modules) Degree in any field.
- Challenge Status
 - Certified Financial Planner (CFP) holders
 - Other professional certificants e.g. Chartered Financial Analyst (CFA), Chartered Accountant (CA), Certified Islamic Finance Professional (CIFP) or equivalent with 3 years experience
 - Bachelor's degree holder in any discipline with 5 years minimum experience in Islamic financial services industry.

Mode of Learning Face-to-Face

1. What is the Islamic Financial Planner (IFP®) program?

The Islamic Financial Planner (IFP®) is a training and certification program designed especially for professionals and executives serving the retail segment of the Islamic financial market. IFP® acts as pre-requisite for Capital Market Services Representative's License (CMSRL) by Securities Commissions (SC) and Financial Advisers' Representative License (FAR) by Bank Negara Malaysia (BNM). This program is a joint collaboration between IBFIM and Financial Planning Association of Malaysia (FPAM), and receives Full Accreditation from Finance Accreditation Agency (FAA).

2. What areas of knowledge do the IFP® program covers?

The IFP® program covers the major components of financial planning with the Islamic aspects being comprehensively integrated into each of the modules.

3. What are the IFP® modules?

- M1 - Shariah & Major Components of Islamic Financial Planning
- M2 - Islamic Risk Management, Estate & Waqf Planning
- M3 - Islamic Investment, Retirement, Zakat & Tax Planning
- M4 - Islamic Financial Plan Construction & Professional Responsibilities

4. What is the IFP® Challenge Status program?

Candidates having the following qualifications and/or professional credentials are eligible to apply for the IFP® Challenge status.

- Certified Financial Planner (CFP) holders
- Other professional certificants e.g. Chartered Financial Analyst (CFA), Chartered Accountant (CA), Certified Islamic Finance Professional (CIFFP) or equivalent with 3 years experience
- Bachelor's degree holder in any discipline with 5 years minimum experience in Islamic financial services industry.

5. How long is the training?

- 7 days for Module 1
- 9 days for Module 2
- 8 days for Module 3
- 4 days for Module 4
- 6 days for Challenge Status

6. Why should Unit Trust consultants, Takaful agents and Islamic bankers be IFP® Holders?

Being certified as an Islamic Financial Planner will equip them with all the necessary knowledge to serve clients better and to become a financial advisory professional. The IFP® program sets the competency standards and ethical practices of the professionals. In short, the consultants and agents can look forward to a fulfilling and prosperous career of being an Islamic financial planner.

7. What are the exemptions granted by the industry for IFP® holders?

IFP® graduates are exempted from the Pre-Contract Examination for Takaful Basic Examination (TBE) by Malaysian Takaful Association (MTA) and Insurance Agents (PCEIA) Part A, B & C by Malaysian Insurance Institute (MII).

8. Is the IFP® program recognised by Securities Commissions and Bank Negara Malaysia?

IFP® qualification is recognised by the SC for Capital Market Services Representative's License (CMSRL) for financial planning and by BNM for Financial Adviser's Representative license (FAR).

Registration Form

Please tick the appropriate box

Module One Two* Three* Four* Challenge Status

Intake: Month: Year:

*Only for existing participants

Personal Details of Participant

Name :

NRIC/Passport :

Member of Professional Body :

Membership No (any):

Organisation :

Address :

Designation :

Department :

Tel No : Mobile No :

Email Address :

Mode of Payment:

- Cash
- Cheque No :
Bank Details :
- Credit Card No :
Expiry Date:
- Sponsorship (Please attach supporting document)
- EPF Withdrawal

Course Fee**

Module One	RM2,173
Module Two	RM2,438
Module Three	RM2,438
Module Four	RM2,226
Total	RM9,275
Challenge Status	RM2,756

**inclusive of Examination & Government Service Tax (GST) of 6%

Instruction

Please fill-up this form and fax your registration to 03- 2020 1812 or send as attachment via e-mail to training@ibfim.com. Cheque should be payable to IBFIM. Please send cheque with this registration form to IBFIM, 4th floor, Talent Development Department, Menara Takaful Malaysia, Jalan Sultan Sulaiman, 50000 Kuala Lumpur by registered mail/courier. IFP contact number is 03-2031 1010 ext 563/564/599.

FPAM & IBFIM reserve the right to make changes to date, venue & speaker and shall notify participants accordingly.

IFP® Challenge Status program is a fast-track program for those who are already involved in the related industry and also have similar professional qualifications e.g CFP, RFP, ChFC, CFA, CPA, CA or Candidates having a Bachelor's Degree (in any field) and have gained 5 years of finance related experience.

TRADE MEMBER REGISTRATION FORM – IFP CERTIFICATION COURSE

Please complete in "BLOCK LETTERS". (Please circle where applicable)

1. PARTICULARS OF APPLICANT

Name (Full name as in NRIC):			
New IC number / Passport No.:		Date of Birth:	
Correspondence Address:			
			Post Code:
Mobile No.:		Home Tel:	
Email address (Preferred):			
Email address (Alternate):			
Gender : Male / Female	Marital Status: Single / Married / Others	Race : Bumiputra / Chinese / Indian / Others	

2. EDUCATION ATTAINED

University	Qualification	Year awarded

Note : Please include certified true copy of degree

3. EMPLOYMENT

Name of Organisation:		Job Title:	
Company's address:			
Post Code:		Office No.:	
		Fax No.:	
Industry Profile:	INSURANCE	UNIT TRUST	BANK
	ACCOUNTANT	ASSET MANAGEMENT	FINANCE COMPANY
TRUST & WILLS	STOCK BROKING	FINANCIAL ADVISORY	NON FINANCE CORPORATION
	ACADEMIA	STUDENT	

4. WORKING EXPERIENCE

Years of Experience	Industry (Eg. Insurance, Unit Trust)	Position Held	Company

5. PAYMENT

Payment to : **FINANCIAL PLANNING ASSOCIATION OF MALAYSIA**

Application fee (included 6% GST) : **RM53** - January to December **RM26.50** - July to December

By Cash By Cheque : _____

By Credit Card (Direct Debit) VISA MASTER AMEX (for AMEX card holder: 4 digit bank code on front of card _____)

Card number : _____ Card Expiry date: _____

6. IMPORTANT NOTE

You are required to upgrade to Associate status within 3 months of passing Module 1, failing which you will be required to resit the Module.

7. DECLARATION (BY APPLICANT)

I hereby declare that all information is true to the best of my knowledge, and I understand FPAM reserves the rights to verify information I have provided in this form. I agree to adhere by FPAM's Professional Code of Ethics & Professional Responsibilities.

Signature : _____ Date : _____

Trade Member ID : _____

Date : _____