



FINANCIAL PLANNING LEADERSHIP AWARDS

Celebrating **25 YEARS OF EXCELLENCE**

As part of our 25th Anniversary celebrations, FPAM is proud to introduce the Financial Planning Leadership Awards, recognizing the outstanding contributions of our Charter and Corporate members.

Be Recognized

Share Your Story

Inspire Others

AWARD CATEGORIES

Platinum

Meet 7 or more criteria for exceptional contributions in advancing financial education.

Gold

Meet 5 criteria, showcasing significant efforts in advancing financial education.

Silver

Meet 3 criteria, highlighting meaningful contributions in advancing financial education.

HOW TO PARTICIPATE

1. Identify your qualifying achievements.
2. Submit the attached participation form and required documents* to secretariat@fpam.org.my by 18 August 2025.
3. Should the need arise, a third party vendor will contact you to schedule an interview for more information and document your contributions.
4. Receive the award during FPAM's Financial Planning Leadership Awards Ceremony: 26 November 2025.

**Please refer to page 4 of this deck for more information on documents to submit.*

☎ 03-7954 9500

🌐 <https://fpam.org.my/>

✉ info@fpam.org.my

Financial Planning Association of Malaysia
Unit 305, Block A, Phileo Damansara 1, Jalan 16/11, Off Jalan Damansara. 46350 Petaling Jaya, Selangor



FPAM FINANCIAL PLANNING LEADERSHIP AWARDS PARTICIPATION FORM

Company Name

Contact Person

Designation

Department

Contact Number

Email Address

Declaration

☐

I confirm that the information provided in this form is accurate and true to the best of my knowledge.

☐

I have read and understood the Terms & Conditions of the Financial Planning Leadership Awards.

☐

I am authorized to submit this form on behalf of my organization.

Name: _____

Designation: _____

Date: _____

Signature: _____

Company Stamp

FPAM FINANCIAL PLANNING LEADERSHIP AWARDS

PARTICIPATION FORM

Eligibility Criteria

To be considered for the Financial Planning Leadership Awards, members must meet a minimum of three (3) criteria listed below. Kindly review the criteria carefully and tick the boxes that apply to your organization. Supporting documents must be provided for all selected criteria.

- ☐ 1. CFP Professionals: Have at least 10 CFP professionals within the organization.
- ☐ 2. Digital Campaigns/App: Utilizing websites, apps, videos, social media platforms, online tutorials, or hotlines to provide consumers with free and impartial information, tools, and resources. Ensuring consumers can navigate the financial landscape and access the information they need.
- ☐ 3. Print: Publishing books, toolkits, and training materials to offer free financial education to the public.
- ☐ 4. Events: Delivering public financial education through engaging events such as roadshows, focus groups, games, and other interactive initiatives.
- ☐ 5. Support for Vulnerable Groups: Developing special programs or resources for specific groups, such as individuals experiencing high financial stress, low-income earners, vulnerable seniors, or those affected by religious considerations in loans and borrowings.
- ☐ 6. Innovative Examples: Adopting cutting-edge technologies in business models, including the Internet of Things, artificial intelligence, and the sharing economy, to enhance financial education.
- ☐ 7. Co-effort Examples: Partnering with or sponsoring charities, schools, non-profits, or policymakers to support financial education programs.
- ☐ 8. Volunteering Programs: Creating sustainable volunteer programs where promoting financial education is a primary goal or activity.
- ☐ 9. Employee Programs: Offering workplace financial wellness programs to support employees' financial well-being.
- ☐ 10. Research Examples: Commissioning research to highlight the need for financial education, sharing best practices, and publicizing key findings.
- ☐ 11. Digital Finance Related: Initiatives focusing on digital finance, including open finance, crypto-assets, and Central Bank Digital Currencies (CBDCs), among others.

Instructions:

- Please complete this form by ticking the applicable criteria and submit it along with all relevant supporting documents no later than 18 August 2025.
- Please ensure all qualifying achievements occurred from 1 January 2023 to 31 December 2024.
- Kindly note that an independent external party has been appointed to review your submission, including the criteria met and documents provided. If additional information is required, they will contact your organization to schedule an interview.

WHAT DOES IT MEAN TO WIN?

Winning a **Financial Planning Leadership Award** is a celebration of your organization's **excellence**, **leadership**, and **innovation** in the financial planning industry. It acknowledges your commitment to driving meaningful change and making a lasting impact through financial education, community programs, and cutting-edge solutions.

This prestigious award places your organization in the spotlight, demonstrating to peers, clients, and stakeholders that you are at the forefront of shaping Malaysia's financial planning landscape. It is public proof of your achievements, reinforcing trust and credibility among your clients and partners. Winning not only celebrates your past efforts but also sets a benchmark for continued excellence in advancing the profession.

WHY PARTICIPATE?

As part of the recognition, your success will be celebrated and widely shared during and after the event:

- **Event Coverage:** Receive your award on stage at the awards ceremony in front of industry leaders, policymakers, and financial professionals.
- Your organization will be featured in the **FPAM Financial Planning Leadership Awards Book**, showcasing your achievements and impact in the financial planning profession.
- **Dedicated Web Page:** A dedicated webpage on FPAM's platform will feature your achievements, ensuring long-term visibility and acknowledgment.
- **Social Media Highlights:** Post-event, each winner will be showcased individually on FPAM's social media channels to amplify your achievement.
- **Press Release Feature:** Your organization will be mentioned in post-event press releases distributed to a broad audience, further cementing your reputation as a leader in the industry.
- Winning this award is not only a celebration of what your organization has achieved—it's also a platform to inspire others, shape the future of financial planning, and solidify your position as a trusted, innovative, and impactful leader in the profession.

EXAMPLES OF SUBMISSION DOCUMENTS

Participants must provide documentation as evidence of meeting the award criteria. Examples include:

- Copies of published marketing materials, reports, or toolkits related to financial education.
- Screenshots or links to digital platforms showing apps, online tutorials, or social media campaigns.
- High-quality photos or videos from events, campaigns, or community outreach initiatives.
- Details or reports from research highlighting innovative programs or findings.
- Volunteer program descriptions, or partnership agreements.

Kindly label the correct criteria on your file. For example, if you have met our 4th criteria by conducting a financial education event for the public, please include a post event write up, website or social media link (if applicable) with photo in PDF document and label the file as "4 - Events".

KEY MILESTONES

- Confirmation Deadline: 18 August 2025
- Interview Period: 15 July 2025 – 10 September 2025.
- Additional Documents Submission Deadline: 10 September 2025
- Awards Ceremony: 26 November 2025

TAKE ACTION!

Earn recognition for your organization's impactful contributions to the financial planning profession. Submit your confirmation of participation along with the required supporting documents by 18 August 2025. Showcase your achievements and gain the acknowledgment your work deserves.

PARTICIPATION PROCESS

1. Review Criteria: Members are encouraged to review the eligibility criteria and identify their qualifying achievements. Please ensure all qualifying achievements occurred from 1 January 2023 to 31 December 2024.
2. Look through the criteria checklist and tick the applicable criteria.
3. Complete the participation form.
4. Submit the following to secretariat@fpam.org.my by 18th August 2025:
 - Application form
 - Criteria Checklist
 - Relevant documents (Please refer to page 4 of the attachment for more information on documents to be submitted)
5. Submit a high-resolution company logo in AI or PNG format for use in promotional materials.
6. Be ready for an independent review of your submission by an appointed third party (Yellow Tree), who may contact you for additional information or schedule an interview if necessary. The interviewee you select should be someone who is familiar with the activities and initiatives that demonstrate how your organization meets the eligibility criteria.
7. You will be notified once your award is confirmed and receive an invitation to attend the award ceremony to be held on 26th November 2025.
8. Award Presentation: Receive the award during FPAM's Financial Planning Leadership Awardson 26th November 2025.

TERMS & CONDITIONS

1. Submission: By participating, members confirm that all submitted information is accurate and verifiable. Only achievements from 1 January 2023 to 31 December 2024 will be considered for eligibility.
2. Awards Book Content Review: Participants will receive a draft of their feature for review prior to publication. Participants may request one (1) round of revision for factual accuracy and clarity. FPAM reserves the right to make final editorial adjustments for formatting, consistency, and publication standards while preserving the essence of the original content.
3. Logo and Branding: FPAM reserves the right to use submitted logos and materials in promotional content related to the awards ceremony.
4. Timeliness: Participants must adhere to deadlines for submissions, interviews, and logo delivery to ensure inclusion in event materials.
5. Event Attendance: While participation in the awards program is complimentary, attendance at the FPAM Financial Planning Leadership Award Ceremony requires the purchase of an event ticket. Ticket options are as follows:
 - Individual tickets are priced at RM400 per seat
 - For a more inclusive experience with your team, you may reserve a full table of 8 seats for RM3,000
6. Event Changes: FPAM reserves the right to make adjustments to event dates, venues, or agendas, and will notify participants promptly.
7. Force Majeure: FPAM is not liable for any failure to fulfil award recognition benefits due to circumstances beyond its control.
8. Dispute Resolution: Any disputes regarding the awards will be resolved amicably through discussion. If unresolved, they will be subject to Malaysian laws.

KEY DATES

- Confirmation Deadline: 18 August 2025
- Interview Period: 11 August 2025 – 10 September 2025
- Document Submission Deadline: 10 September 2025
- FPAM Financial Planning Leadership Award Ceremony: 26 November 2025

CONTACT INFORMATION

For questions or further details, please contact:

- Ms Sheryn Wong – email sheryn@fpam.org.my
- Ms Ooi Su Ling – email suling@fpam.org.my