



Registered Financial Planner (RFP) Train The Trainer Course



RFP TRAIN THE TRAINER COURSE

OBJECTIVE OF THE TRAINING

- To provide trainers the fundamentals of facilitating a class and ensuring professionalism in the delivery of the subject.
- To provide a better understanding and effective delivery of the subject.
- To provide an overview and effective use of the standardized presentation slides provided.



EDUCATIONAL SERVICE PROVIDER
OF THE YEAR 2012



PROFESSIONAL SERVICE PROVIDER
OF THE YEAR 2007

AREAS COVERED

- Refresher on the Fundamental of Training
- Overview of the RFP Module Contents
- Overview of the RFP Module Presentation Slides

COURSE SCHEDULE

RFP Module 1	11 to 13 March 2019 (Closing date : 18 February 2019)
RFP Module 2	8 to 9 April 2019 (Closing date : 19 March 2019)

CERTIFICATION

Certification as certified RFP Trainer for the specific module will be given by MFPC upon satisfactory completion of the course (80% attendance) and passing the RFP examination.

PARTICIPANTS SELECTION CRITERIA

- Posses relevant tertiary education or recognised professional qualification;
- Some teaching experience with acceptable teaching competency;
- Proven knowledge base of the subject(s);
- Ability to lecture and conduct tutorials;
- Ability to assess students' assignments, examination, etc;
- Ability to communicate effectively in English or Bahasa Malaysia or Mandarin where such RFP programmes are conducted in the respective languages;
- The ability to relate to students from a variety of backgrounds ;
- Has undergone the MII-RFP Course.

FEES	CLASS SIZE	MEDIUM OF INSTRUCTION
RFP Module 1 - RM 1,590 RFP Module 2 - RM 1,010	Recommendation for each class is 25 trainers	English

*Price is inclusive of 6% SST

COURSE OUTLINE

Module 1 – Fundamentals of Financial Planning

1. Financial Planning Environment, Phenomenon and Process
2. The Regulatory Environment for Financial Planners
3. Ethics and Professionalism
4. Personal Financial Statements
5. Cash Flow Management
6. Time Value of Money
7. The Economic Environment and its Impact on Financial Planning
8. Risk Tolerance
9. Investment Planning
10. Tax Planning
11. Risk Management and Life Insurance Planning
12. Estate Planning Issues, Process, Personalities and Instruments
13. Retirement Planning Tools and Processes

Module 2 – Risk Management and Insurance Planning

1. Understanding Risks
2. Risk Management
3. Insurance Needs Analysis
4. Life Insurance Policies
5. Health Insurance Policy Analysis
6. Annuities
7. General Insurance Products in Insurance Planning
8. Takaful
9. Legal Principles and Relevant Legislation in Insurance
10. Consumer Protection and Life Insurance Industry Code of Practice
11. The Financial Sector Master Plan
12. SOCSO

APPLICATION FORM (Registered Financial Planner (RFP) Train The Trainer Course) 2019

RFP Module 1	Date of course	RFP Module 2	Date of course
	<input type="checkbox"/> 11 to 13 March 2019 (Closing date : 18 February 2019)		<input type="checkbox"/> 8 to 9 April 2019 (Closing date : 19 March 2019)

Please tick (√) the appropriate box/es to indicate the module and session preferred.

PERSONAL DATA

a. Full Name (as per IC or Passport) : _____
Mr. / Mrs. / Ms. (delete as appropriate)

b. Gender : Male Female c. Date of Birth : (dd) (mth) (yr)

d. NRIC : _____ e. Race : _____

f. Principal Company : _____

g. Designation : _____ h. Department : _____

i. Address : _____

j. Telephone No : _____ Fax No : _____ Email : _____

DETAILS OF EDUCATION

(Please enclose copy of certificate (s) which must be certified as true and unaltered presentation of the original certificates)

Name of School / Examining Body / Institute	City / Country	Year		Highest Qualification
		From	To	

PAYMENT OPTIONS (Please tick (√) method of payment)

Cash Payment

Enclosed is a Bankdraft / Money Order no. for RM _____ made payable to the Malaysian Insurance Institute.

Direct Bank In to MII account : **2-64160-00004670**
RHB Bank Bhd, Lot No G-01, Ground Floor, Bangsar Shopping Centre Office Tower Jalan Maarof, Bangsar, 59100 Kuala Lumpur, Malaysia.

Telegraphic Transfer in USD to MII account : **6-14165-0000321**
RHB Bank Bhd, Lot No G-D1, Ground Floor, Bangsar Shopping Centre Office Tower Jalan Maarof, Bangsar, 59100 Kuala Lumpur, Malaysia.

Please charge RM _____ to my credit card. VISA MASTER

Card number : CVV ** only credit card accepted.*

Expiry date : _____

Cardholder's signature : _____

PAYMENT OPTIONS (Please tick (√) method of payment)

In regardsto Personal Data Protection Act 2010 ("the Act"), pleased note that your personal data is used,stored, disclosed and processed by MIIsolely for the Purpose of registering examination, processing result and/or in connection to other MII products or services. Your personal information may also be disclosed or transferred to relevant third party i.e to the industry related associations, industry related companies, government agencies and any of their respective agents. Any inquiries or complaints with respect to your personal information may also be channeled to MII by submitting such request to MII via post, email (customercare@mii.org.my) or facsimile (03-2093 7885).

Applicant's declaration
I am deemed to have consented to MII to use, store, disclose and process my personal data for the Purpose mentioned above and agree to comply with and be subject to the jurisdiction of all rules and regulation of MII concerning the course and examination.

Applicant's Signature : _____ Date : _____

Enquiries

For more information and to register, please visit us online www.insurance.com.my or contact: Malina (262) / Haziq (255) or email to sales@mii.org.my