



Overview

- Define what is Life Underwriting
- List the roles & responsibility of an Underwriter.
- Describe reasons for Underwriting (selecting) risks
- Explain the tools of Underwriting
- List the classification of underwriting
- List the basic steps in Underwriting process
- Acquire the application of theories and concepts into practice

Key Learning Outcome

At the end of the program, participants should be able to:

- understand the concept of Life Underwriting
- understand aims of the underwriter, short term and long term
- understand the factors involved in Risks selection
- identify type or source of documents to shape the final underwriting decision
- identify what's sub-standard/standard or medical and non-medical cases
- understand on process flow, from date of accepting proposal form until date of final decision making.
- Application of theories and concepts learned into practices based on case scenarios

Key Course Content

1. Introduction to Basic Life Underwriting
2. Who's the underwriting personnel? What's their authority and approaches
3. The principle of Risks selection
4. The tools of Underwriting
5. The classification of Underwriting
6. The Underwriting process
7. Case study 1 & 2

Target Audience

Employees with less than 2 years' insurance experience

Trainer's Profile

EDWIN LAU

B.Sc (Hons) (UK), MFP(Aust), ANZIIF(Senior Assoc), ChFC, CFP, RFP and Shariah RFP

Edwin has been actively involved in insurance industry for more than twenty five years. He has held various positions as Manager of Underwriting, Branch Head and Head of Operations and Customers Service. He has a Bachelor of Science (Honours) and possesses a Master in Financial Planning. He is also a Senior Associate of The Australian Insurance Institute and New Zealand Institute of Insurance and Finance (ANZIIF).

He currently provides financial planning consultancy to both individual and business owners in the financial services industry. He serves as Treasurer of the Malaysia Financial Planners & Advisers Association.

He also conducts regular training in technical insurance with Malaysian Insurance Institute and various institutions in financial planning for professional examination. He is a certified trainer to Malaysian Insurance Institute, RFP program in addition to CFP program.

Edwin is a Chartered Financial Consultant (ChFC), a Certified Financial Planner (CFP), Registered Financial Planner (RFP) and Shariah Registered Financial Planner (Shariah RFP).

Date	24-25 July 2019
Closing Date	4 July 2019
Time Duration	9 am - 5 pm 2 Days
Price	MII Member : RM 955 (single), RM 900 (Group) Non Member : RM 1170 (Single), RM 1110 (Group) International: USD300 (Single), USD280 (Group) (HRDF Claimable) * Subject to HRDF Conditions * Price is inclusive of 6% SST
Level	Foundation
CPD Points	14
Venue	THE MALAYSIAN INSURANCE INSTITUTE MII City Centre, Suite 6.0W, Level 6 Wisma FGV, Jalan Raja Laut, 50350 Kuala Lumpur

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- Registration can be done via online at www.mii4u.org/llms/user/login. (*Group Registration : Minimum 3 participants and above)
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