The Malaysian Insurance Institute

Application for RFP Train the Trainer Course (2008)

Registered Financial Planner (RFP) General Information

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OBJECTIVE OF THE TRAINING

- To provide trainers the fundamentals of conducting a class and ensuring professionalism in the delivery of material;
- To make aware of the theories applicable to adult learning and education;
- To provide the training techniques and administrative procedures of the respective courses.
- To provide a "hands-on experience" on conducting classes.

AREAS COVERED

Refresher on the Fundamental Principles of Training

- What is Training
- Learning Principles
- Methodology
- Delivery
  - The coverage of course content and recommendation of reading materials / reference materials
  - Preparation and delivery of lectures for the module taught
  - Review of text materials, slide presentation and course plan

SELECTION CRITERIA

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

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 of assessment and the RFP examination.

DURATION

Each module - 2 1/2 days

COURSE SCHEDULE

- Module 1 :
  24 - 26 Mar 2008 *(Closing Date : 3 Mar 2008)*
  22 - 24 Sept 2008 (*Closing Date : 1 Sept 2008)*
- Module 2 :
  27 - 29 Mar 2008 *(Closing Date : 3 Mar 2008)*
  25 - 27 Sept 2008 (*Closing Date : 1 Sept 2008)*

CLASS SIZE

Recommendation for each class is 25 trainers.

MEDIUM OF INSTRUCTION

- English

FEES

Each module RM500 *(inclusive of tea-breaks, lunches and training materials)*

REGISTRATION

By completing the Application Form and submitting it to MII with payment before the closing date.

COURSE OUTLINE

Module 1 – Fundamentals of Financial Planning

1. The Financial Planning Phenomenon in Malaysia
2. Personal Financial Statements, Financial Ratios and Cash Flow Management
3. Regulatory Control and Practices Affecting Personal Financial Planning
4. Professionalism & Ethics in Financial Planning Practices
5. Assessing Risk Tolerance Level
6. Fundamentals of Risk Management
7. Risk Management Tools: Insurance Fundamentals and Products
8. Time Value of Money: Fundamental Concepts and Applications
9. Investment Concept, Planning and Strategies
10. Tax Planning
11. Estate Planning Issues, Process, Personalities and Instruments
12. Retirement Planning Tools and Processes

Module 2 – Risk Management and Insurance Planning

1. Insurance Needs Analysis
2. Multi-line Insurance Products in Insurance Planning
3. Legal Principles In Insurance
4. Life Insurance Policy Analysis
5. Comparing Life Insurance Products
6. Annuity Policy Analysis
7. Health Insurance Principles Analysis
8. Legislation Affecting Insurance Business
9. Evaluating Life Insurance Companies
10. Consumer Protection and Life Insurance Industry Codes of Practice
11. Compliance and other Issues: The Financial Sector Master Plan
12. Social Security: SOCSO

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Registered Financial Planner (RFP) Application Form

The Malaysian Insurance Institute

Please tick (√) where appropriate

Date of course : ❑ **Module 1 (24 - 26 March 2008)** ❑ **Module 2 (27 - 29 March 2008)**
Closing Date : 3 March 2008

❑ **Module 1 (22 - 24 September 2008)** ❑ **Module 2 (25 - 27 September 2008)**
Closing Date : 1 September 2008

Section A : Personal Details

Name :

NRIC No:

Sex :

Race:

Marital Status:

Correspondance Address :

Employer's Address:

Tel. No. (Home)

Tel. No. (Office):

Fax No:

Mobile No :

E-mail address:

Section B : Professional Details

B1. Educational Background
Academic/Professional Qualifications *(Please attach certified copies of qualifications acquired)*

Year	Qualifications	Name of Institution	Title / Degree awarded *(Abbreviations only)*

B2. Training / Working Experience

Year *(eg. 1990 - 2000)*	Company	Designation

B3. Other Related Experiences *(eg. Teaching experience / Research / Projects / Consultancy / involvement in societies, etc.)*

Year *(eg. 1990 - 2000)*	Company / Institution	Details of experience

Section C : Method of Payment *(Please tick (√) where appropriate)*

Payment: All company cheques to be made payable to "The Malaysian Insurance Institute" 30 days before the commencement of programme. Participants will not be registered for the programme until payment is received. We wish to inform that ***MII does not accept personal cheques****.*

❑ Enclosed is a CROSSED CHEQUE or BANK DRAFT no. _______________ in Malaysian Ringgit made payable to **The Malaysian Insurance Institute.**

❑ Please charge the total amount of RM ___________ to my CREDIT CARD:
❑ Visa ❑ MasterCard

Card No...

Expiry Date ....

Signature ....