

ISLAMIC FINANCIAL PLANNER

The qualification for your Islamic financial advisory business



Takaful

Syariah-approved Investment



Zakat & Tax

Faraid, Wasiyyah, Hibah & Amanah



Retirement & Waqf



ISLAMIC FINANCIAL PLANNER is designed especially for professionals and executives serving the retail segment of the Islamic financial market. The continued innovation of Islamic financial products and growing demands of discerning Muslim retail clientele call for higher standards of competency and ethical practice of financial planning professionals. Coupled with the Government's drive to turn Malaysia into an International financial center for Islamic Finance as the backdrop, the introduction of this program is to forge Malaysia's leadership in Islamic Finance.

OBJECTIVES

This program prepares candidate to be a competent financial planner capable of meeting the financial planning needs of the consumer in conformity to Shariah. The Islamic Financial Planner shall be equipped with all the necessary knowledge of financial advisory for the retail market.

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

- ⇒ Have clear appreciation of Islamic financial planning
- ⇒ Guide clients through the financial planning process
- ⇒ Advise clients on how they may achieve their financial goals and *al-falah*
- ⇒ Implement and monitor the financial plan for the client

HOW TO BECOME AN ISLAMIC FINANCIAL PLANNER

The Islamic Financial Planner (IFP) designation shall be awarded to those who have passed a 6-module exam-based certification program:

Module 1:	Fundamentals of Islamic Financial Planning
Module 2:	Risk Management and Takaful Planning
Module 3:	Islamic Investment Planning
Module 4:	Zakat and Tax Planning
Module 5:	Islamic Estate, Retirement and Waqf Planning
Module 6:	Financial Plan Construction and Professional Responsibilities

WHO SHOULD GET THE IFP

Within the retail segment of the Islamic financial market, the IFP designation is highly relevant to:

- ⇒ Takaful agent
- ⇒ Retail/Personal financial services executive and manager
- ⇒ Unit trusts agent
- ⇒ Wealth management executive and manager
- ⇒ Estate planner executive and manager
- ⇒ Financial planning professionals

ENTRY REQUIREMENTS

Candidates must have a minimum of:

- ⇒ Sijil Pelajaran Malaysia; and
- ⇒ Relevant working experience in the financial services industry

THE EDUCATION PROVIDER

Trainings are conducted by industry practitioners and qualified trainers. To enroll, kindly contact IBFIM or FPAM for details.

MODE OF INSTRUCTION

Minimum of 40 hours of classroom training for each module.

METHODS OF ASSESSMENT

Exams are conducted at designated centers nationwide twice a year, in June and December.

Module	Type of Exam
1, 2, 3, 4 and 5	60 Multiple-choice Questions within 2 hours
6	Part A: 60 Multiple-choice Questions within 3 hours Part B: Case Analysis and Essay within 3 hours

YOUR INVESTMENT

Candidates are responsible for tuition fee and exam fee:

Module	Tuition	Exam
M1	RM 1,500	RM 300
M2	RM 1,000	RM 300
M3	RM 1,000	RM 300
M4	RM 1,000	RM 300
M5	RM 1,000	RM 300
M6	RM 1,500	RM 300
Total	RM 7,000	RM 1,800

For enquiries and registration, please contact:

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