

IFP CLASS SCHEDULE AND COURSE OUTLINE

Module 6: Financial Plan Construction and Professional Responsibilities		
Date & Time of Class	Section	Topics
Sat, 22 Jan 2011 (9.00 am)	SHARIAH AND INDUSTRY REVIEW FUNDAMENTAL FINANCIAL PLANNING PRACTICES & COMPETENCIES - 1	1.0 Shariah Overview 2.0 Industry development - Regulatory frameworks, issues & trends 3.0 Establishing Relationship with the Client 4.0 Process of Data Gathering 5.0 Financial Analysis of Client's Data
Sat, 29 Jan 2011 (9.00 am)	FUNDAMENTAL FINANCIAL PLANNING PRACTICES & COMPETENCIES – 2	6.0 Strategies to Meet Client's Needs 7.0 Plan Preparation 8.0 Plan Construction and Case Studies : Cash Flow and Liability Management 9.0 Plan Construction and Case Studies : Risk Management and Takaful
Sat, 12 Feb 2011 (9.00 am)	PLAN CONSTRUCTION AND CASE STUDIES -1	10.0 Plan Construction and Case Studies : Zakat and Tax 11.0 Plan Construction and Case Studies : Islamic Estate and Waqf
Sat, 19 Feb 2011 (9.00 am)	PLAN CONSTRUCTION AND CASE STUDIES - 2	12.0 Plan Construction and Case Studies : Islamic Investment 13.0 Plan Construction and Case Studies : Retirement 14.0 Plan Construction and Case Studies : Comprehensive Islamic Financial Plan
Sat, 26 Feb 2011 (9.00 am)	PLAN IMPLEMENTATION & PROFESSIONAL RESPONSIBILITIES	15.0 Plan Implementation Process 16.0 Financial Plan Review 17.0 Duties of the Financial Planner 18.0 Dealing with Client Complaints 19.0 Code of Ethics for Islamic Financial Planner
Sat, 12 March 2011 (9.00 am)	Revision class	
Sat, 19 March 2011 (10.00 am – 1.00 pm)	EXAM DAY	60 multiple-choice questions
Sun, 20 March 2010 (10.00 am – 1.00 pm)	EXAM DAY	Case Study

Course Title	Financial Plan Construction and Professional Responsibilities
Synopsis	<p>This course is designed to prepare candidates to become a competent financial planner capable of meeting the financial needs of the clients in conformity to Shariah. Candidates are provided with relevant Shariah and regulatory frameworks, systematic processes, technical knowledge, skills and tools necessary to develop a comprehensive Islamic financial plan.</p> <p>Plan construction and case studies will cover the key Islamic financial planning components consisting of cash flow and liability management, risk management and Takaful, Islamic investment, Zakat and tax, retirement, Islamic estate and Waqf. Candidates will also be exposed to the ethics and professional responsibilities of an Islamic financial planner</p>
Objective	<p>The objective of this course is to equip candidates with adequate knowledge of a systematic process to gather, analyze and synthesize information from clients in order to develop and implement a comprehensive Islamic financial plan.</p>
Learning Outcomes	<p>Upon completion of the course, the participant is able to:</p> <ol style="list-style-type: none"> 1. Understand Shariah and regulatory frameworks as well as pertinent issues and trends in the industry 2. Understand the systematic process of developing a financial plan 3. Comprehend how to construct and strategize a holistic Islamic financial plan. 4. Comprehend the implementation and review process of the financial plan 5. Understand the professional responsibilities and ethical conducts of an Islamic financial planner