

***Sample Letter for Employees Working in Financial
Institutions/Regulatory Bodies/Accounting and Tax Firms***

***Please print on Employer's Letterhead. Original copy of letter must be sent to FPAM.
Fax copy alone will not be entertained.***

Date:

Membership Department
Financial Planning Association of Malaysia
Unit 305, Block A, Phileo Damansara I
Jalan 16/11, Off Jalan Damansara
46350 Petaling Jaya
Selangor

Dear Sir,

Re: Reference Letter

This is to confirm that Mr/Mrs/Ms. (IC No.) has been in our employment as (please indicate job position) from to

He/She is a member of (Please list name of professional bodies of which applicant is a member).

Mr/Mrs/Ms job responsibilities in the company are detailed as below:

Note:

Please indicate job responsibilities and a brief description of responsibilities and also allow 1 paragraph for each job responsibility. This letter should cover an employment period of at least 3 years within the 5 years preceding the date of this letter. If the applicant has been in the present employment for less than 3 years, he/she is required to obtain a testimonial letter from his/her prior employer(s).

The number of points listed below is a sample only and is not exhaustive. Please provide complete list of job responsibilities

1. Strategic Planning

Responsible for preparation of annual budgets and quarterly forecasts. Worked closely together with the upper management for the preparation of budgets and forecasts which acts as benchmarks for the company to measure its performance.

2. Compliance and/or Developing Industry Rules

Ensuring compliance of financial services industry's rules by the company's employees or agents or developing industry rules for the industry's associations or regulating bodies.

3. Developing and Marketing Financial Services and Products

Responsible for or assist in developing and marketing financial services and products for the company.

4. Training and Professional Development

Responsible for training and imparting knowledge to employees, students or agents on financial planning services and products.

5. Taxation Compliance and Planning

Review company/client's business to ensure adherence to taxation laws, structure the business so that the company/client is tax efficient as far as possible.

Please also provide character reference for applicant wherever possible.

The company is proud to support his/her application for the challenge status.

Yours sincerely,

Name:

Designation:

(To be signed by personnel from the Human Resources Department/General Manager or other senior management staff)