

Financial Planning Association of Malaysia  
 Unit 1109, Block A, Pusat Dagangan Phileo Damansara II  
 No. 15, Jalan 16/11, Off Jalan Damansara  
 46350 Petaling Jaya, Selangor Darul Ehsan  
 Tel: 03-7954 9500 Fax: 03-7954 9400

| Application for Modular Exemption for the CFP certification course |   |                       |              |
|--|---|-----------------------|--------------|
| Name   | : |                       |              |
| New IC number  | : |                       |              |
| Correspondence Address   | : |                       |              |
|  |   | Post Code:            |              |
| Contact Number   | : | Mobile:               | Office:      |
| Email address  | : |                       |              |
| Qualifications   |   |                       |              |
| Name of Institution  |   | Qualification awarded | Date awarded |
|  |   |                       |              |
|  |   |                       |              |

I am applying for exemption based on the following qualification obtained (please tick ✓):

| ✓ |  | M1 | M2 | M3 | M4 |
|---|--|----|----|----|----|
|   | Chartered Financial Practitioners (Namlifa)  | X  |    |    |    |
|   | MII Dip. In Financial Planning   | X  |    |    |    |
|   | Chartered Life Underwriters  | X  | X  |    |    |
|   | Life Underwriters Training Council of Fellows  | X  | X  |    |    |
|   | Graduate Diploma in Applied Finance and Investment   | X  |    |    | X  |
|   | Member of Malaysian Institute of Taxation  |    |    | X  |    |
|   | Bachelor Degree (Finance / Accounting / Economics with taxation subjects as part of the academic syllabus) |    |    | X  |    |
|   | RFP Programme Module 1 & Module 2 holders  | X  | X  |    |    |

For this application, you need to :

1. Attach a **certified** copy of your **degree and academic transcript** or a certified copy of your **approved credentials** to support your application. Certification can be done by a Commissioner of Oath, CFP certificant, our approved Education Providers or member of MIA. All certification must bear the full name and membership number of certificant (where applicable).
2. Complete the **Trade membership** form (if you are not a member yet) and enclose together with **payment** to FPAM.
3. Applicants who are exempted from Module 1 are required to complete both the Trade Membership and Associate Membership forms.

The membership form can be obtained from FPAM or our approved Education Providers. Please note applications that are not fully completed and/or accompanied by certified copies of documents and Trade membership form will not be processed. ***Fax and/or photocopy applications will not be accepted.***

Those seeking for exemptions for **Module 1- Foundation in Financial Planning** must apply for exemptions **at least one month** before registration for any examination. Applications for exemptions must not be submitted together with your examination registration form. **Failure to comply will result in your application for exemption not being processed in time for your next examination registration.**

I affirm the facts given are true and correct.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date