Financial Planning Association of Malaysia
Unit 305, Block A, Pusat Dagangan Phileo I
Jalan 16/11, Off Jalan Damansara
46350 Petaling Jaya, Selangor Darul Ehsan
Tel : 03 - 7954 9500 Fax : 03 - 7954 9400

Attn : Membership Department

UPDATE ON MEMBER'S INFORMATION

Member ID			
Name			
NRIC No.(New)		**Passport No.**	
Occupation			
Correspondence Address			
PostCode		**State**	
Tel (Office)		**Mobile Tel**	
Tel (House)		**Fax**	
E-mail			

Highest Education Qualification SPM / STPM / Diploma / Degree / Master / Doctorate / Professional Accountancy / Chartered Secretaries / Chartered Financial Consultants

(please circle which is applicable) Others, please specify ____

Is Self-Employed : **Yes / No (Please circle)**

Employer/Business Address			
PostCode		**State**	

Please turn over

Industry of Work	☐	Unit Trust
	☐	Insurance
	☐	Banking
	☐	Accounting and Tax
	☐	Company Secretary
	☐	Asset/Fund Management
	☐	Financial Planning
	☐	Trust & Wills
	☐	Others _________________
Nature of Employment	☐	Self Employed / Own Business
	☐	Agent
	☐	Employee
	☐	Advisor / Consultant
Income Model	☐	Fee only
	☐	Commission only
	☐	Fee + Commission
	☐	Salaried
	☐	Salaried + Bonus and/or Commission
License(s) held	☐	PDUT
	☐	PCE
	☐	Capital Market Services (CMSRL) License No. _____________
	☐	Financial Adviser (FARL) License No. _____________
	☐	Others _________________
Gross Annual Earnings (RM)	☐	< 50,000
	☐	51,000 - 100,000
	☐	101,000 - 150,000
	☐	151,000 - 200,000
	☐	201,000 - 250,000
	☐	> 250,000
Years in Personal Financial Services	☐	< 2 years
	☐	2 to 5 years
	☐	6 to 10 years
	☐	11 to 15 years
	☐	16 to 20 years
	☐	> 20 years
Number of Clients	☐	< 50
	☐	51 - 100
	☐	101 - 150
	☐	151 - 200
	☐	201 - 250
	☐	> 250

Member 's Signature ________ **Date** ________

FOR OFFICE USE ONLY : **Date Updated** ________ **Updated By** ________