Certified Financial Planner *(CFP)*

Why CFP?

Global
Recognition

Obtain the most internationally prestigious and globally recognized financial planning designation

Enhancer
Career Development Opportunities

Attain a broad-based qualification that is useful in the financial & wealth management industries for future career pathway.

Satisfied
Clients

Earn your credibility and trustworthiness with the clients and provide excellent service to clients with the highest ethical and professional standards.

Knowledge
and Competencies

Assesses competency and provide financial planning in the interests of clients.

Personal
Enrichment

Gain insights on securing your personal growth and financial dreams.

The **CERTIFIED FINANCIAL PLANNER™** credential is the most desired and respected global certification for those seeking to demonstrate their commitment to competent and ethical financial planning practice. **CERTIFIED FINANCIAL PLANNER™** professionals meet initial and ongoing education, experience and professional development requirements, pass a rigorous exam that assesses competency, and adhere to a code of ethics, pledging to provide financial planning in the interests of clients and with the highest ethical and professional standards.

In addition, it is widely considered to be the ultimate mark of competence among investors and financial professionals. Individuals pursuing the **CFP** designation stand to gain professional competence from the curriculum, while the prestige that comes with holding the designation can increase an individual's personal business and enhance their career growth and professional experience.

Pathway to become a Certified Financial Planner

Entry Requirement & Modular Exemption

The entrance requirements for CFP Program candidacy:
✓ Have a Bachelor's Degree (in any field)

✓ Sit for Prior Learning Recognition Assessment (PLRA) Programme exam if you did not meet the entry requirement
*Prerequisites: SPM (or equivalent) with 5 years of full time relevant experience in the relevant field.

✓ TAR UMT students/ Alumni from courses below are exempted from CFP Module 3: Investment Planning and Retirement Planning
- Diploma in Banking and Finance
- Diploma in Finance and Investment
- Bachelor Degree of Banking and Finance
- Bachelor Degree of Finance and Investment
- Bachelor Degree of Finance

How to register CFP Programme at TAR UMT

Register online at TAR UMT website -> https://www.tarc.edu.my/cpe/a/professional-programme/
Time: 10am—5pm
Fees:

	TAR UMT Student/ Alumni	Public
Module 1	RM600	RM800
Module 2	RM600	RM800
Module 3	RM600	RM800
Module 4	RM600	RM800
Payment to TAR UMT include tuition fees, additional notes (soft copy) & 6% SST		

*CFP Module 1 must be completed/ exempted before you can start module 2 & 3 (in any sequence).
After completing module 1, 2 & 3, you may proceed to module 4.

FPAM Membership & Register for CFP Examination

FPAM membership

Trade Member (upon register for Module 1)	RM50.00 (January—December) RM25.00 (July—December)
Associate Member (upon register for Module 2)	RM150.00 (January—December) RM75.00 (July—December)

Admin & Resource Fee: RM150 per module (included CFP manual)

Examination Fee

	Module 1, 2, 3	Module 4
TAR UMT Student/ Alumni/ Staff	RM250	RM500
Employee of Charter member	RM250	RM500
Employee of Corporate member	RM300	RM600
Public	RM350	RM700

- Please refer to the Charter and Corporate members listing from FPAM website: https://www.fpam.org.my/
- Membership fee, exam fee, admin & resource fee are paid to FPAM
- Fees are subject to change

Working Experience

3 years of relevant working experience (before, during and after the examination)

Become Certified Financial Planner

Certified Member	RM410.00 (January—December)

Fees is paid to FPAM

COURSE DETAILS

Particulars	Module 2: Insurance Planning and Estate Planning
Intake Date	12 March — 14 May 2023 (*Every Sunday)
Time	10.00am — 5.00pm
Duration	48 hours
Registration Deadline	1 March 2023
Study Mode	*Online Part-Time Weekend Classes
Course Fee	TAR UMT Students/Alumni - RM 600.00 Public - RM 800.00 *inclusive of 6% SST
	✓Inclusive of Course Materials (soft copy) ✓FPAM Manual
Examination Date	10 June 2023

* Subject to change based on the situation

CERTIFIED FINANCIAL PLANNER

FOR ENQUIRIES & REGISTRATION, PLEASE CONTACT:

TUNKU ABDUL RAHMAN UNIVERSITY OF MANAGEMENT & TECHNOLOGY

CENTRE FOR CONTINUING AND PROFESSIONAL EDUCATION **(CPE)**

TEL: 03-4145 0170 **(DIRECT LINE)**

TEL: 03-4145 0123 EXT: 3516 **(MS LEE)**

EMAIL: CPE@TARC.EDU.MY

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