

CERTIFIED FINANCIAL PLANNER (CFP)

MODULE 2: INSURANCE PLANNING AND ESTATE PLANNING

OBJECTIVES

This course is designed to help candidates understand the fundamental concepts of risk management, insurance and estate planning and gain the knowledge about various personal insurance products, both life and general, which are related to financial planning and estate planning tools such will, power of attorney and trust as well as taxation issues affecting estate planning. The candidates are expected to be able to apply these concepts and understand how to formulate appropriate financial plans in assisting their clients.

COURSE DETAILS

Date: 2 January - 5 March 2022

(Saturday, Sunday)

Time: 10.00a.m. – 5.00p.m.

Venue: online classes

EXAMINATION DETAILS

Date: 12 March 2022 (SATURDAY)

Time: 9.00a.m. – 12.00noon

Venue: online examination

COURSE FEES

Candidate	Payment to TAR UC	Payment to FPAM
DBF/DFI/RBF/RFI TAR UC Students/ Alumni	RM600.00*	RM550.00*
Public	RM1,060.00*	RM650.00*
	<i>Payment to TAR UC includes tuition fee and additional notes (soft copy).</i>	<i>Payment to FPAM includes registration fee, textbook, examination and 1 year CFP membership.</i>

* Inclusive of 6% SST

FOR ENQUIRIES & REGISTRATION

TUNKU ABDUL RAHMAN UNIVERSITY COLLEGE

Centre for Continuing and Professional Education

Tel: 03-4145 0170 (Direct Line)

03-4145 0123 ext: 3516 (Ms Lee)

Email: cpe@tarc.edu.my

Website: www.tarc.edu.my



TARC
TUNKU ABDUL RAHMAN
UNIVERSITY COLLEGE
BEYOND EDUCATION



COURSE OUTLINES

Topic 1: Fundamental Concepts in Risk Management

Topic 2: Insurance Fundamentals

Topic 3: Legal Principles in Insurance

Topic 4: The Role of Insurance in Financial Planning

Topic 5: Factors Affecting Life Insurance Needs

Topic 6: Understanding Life Insurance Policy Contracts

Topic 7: General Insurance Policy Contracts

Topic 8: Health Insurance

Topic 9: Annuity Policy Contracts

Topic 10: Legislation and Rules in the Insurance Industry

Topic 11: Consumer Protection and Insurance Industry Codes of Practice

Topic 12: Estate Planning Fundamentals

Topic 13: Wills and Will Planning

Topic 14: Trusts

Topic 15: Power of Attorney

Topic 16: Duties and Power of the Personal Representative

Topic 17: Special Estate Planning Issues for Business Owners

Registration Form

Module 2: Insurance Planning and Estate Planning

(TAR UC Student/ Alumni) Tuition Classes: 2 January – 27 February 2022

(Public) Tuition Classes: 2 January – 5 March 2022

To register, please submit completed registration form and payment as follows:

Director, Centre for Continuing and Professional Education
Kolej Universiti Tunku Abdul Rahman
P.O. Box 10979
50932 Kuala Lumpur
Tel: 03-4145 0170 (Direct Line)
Tel: 03-4145 0123 ext: 3516 (Ms Lee)

Closing date:
17 December 2021

Participant Details

Name : _____

New IC No : _____ Student ID/ Alumni No: _____

Course : _____

Company (if applicable): _____

Correspondence Address: _____

Tel No (H) : _____ Tel No (O) : _____

Fax No : _____ Handphone No : _____

Email : _____

Payment Details

1. Transfer / Cheque / Bank draft no: _____ for amount of RM600.00/ RM1060.00* made in favour of **'KOLEJ UNIVERSITI TUNKU ABDUL RAHMAN'**.
Payment via online - Public Bank Account 3181564113. Please email the bank-in slip to us for record.
2. Direct payment to Financial Planning Association of Malaysia as follows:
Transfer / Cheque / Bank draft no: _____ for amount of RM550.00/ RM650.00* made in favour of **'FINANCIAL PLANNING ASSOCIATION OF MALAYSIA'**.
Payment via online - Alliance Bank Account 121090010005395. Please email the bank-in slip to us for record.

*(Inclusive of 6% SST)

Signature: _____

Date: _____

Terms & Conditions

- 1) Registration is on a first-come-first-served basis
- 2) Participants are requested to submit one form per participant
- 3) All registration must be accompanied with the full payment
- 4) Any withdrawal from the course is subject to the following University College Refund Policy:
 - A 50% refund of fees paid for the course, if a written request is made on or before the commencement date of the course. (Refund will take approximately a month from the official request)
 - No refund of fees for withdrawals received after the commencement of the course.
- 5) Tunku Abdul Rahman University College reserves the right to amend/ change/ cancel the course should unavoidable circumstances arise. In event of cancellation, all fees paid will be refunded.

TAR UC warrants that the personal data collected will be treated with utmost confidentiality and shall not sell, distribute, lease or otherwise disclose any data collected herein to any third parties save and except as outlined in the University's Privacy Policy or permitted by the User or is required by law to do so. Please visit www.tarc.edu.my/privacy-policy.htm for further information on TAR UC Privacy Policy

GST TAX FILE NO. :000173154304

ASSOCIATE MEMBER APPLICATION FORM – CFP CERTIFICATION COURSE

Please complete in "BLOCK LETTERS". (Please circle where applicable)

1. PARTICULARS OF APPLICANT

Name (Full name as in NRIC):			
New IC number / Passport No.:		FPAM Member ID:	
Correspondence Address:			
		Post Code:	
Mobile No.:		Home Tel.:	
Email address (Preferred):			
Email address (Alternate):			
Gender : Male / Female	Marital Status: Single / Married / Others	Race : Bumiputra / Chinese / Indian / Others	

2. EDUCATION ATTAINED

University	Qualification	Year Awarded

3. EMPLOYMENT

Name of Organisation:			
Company's address:			
Post Code:		Office No.:	Fax No.:
Job Title:		<input type="checkbox"/> Employed <input type="checkbox"/> Self-Employed	
Industry Profile:	<input type="checkbox"/> INSURANCE <input type="checkbox"/> UNIT TRUST <input type="checkbox"/> BANK <input type="checkbox"/> ACCOUNTANT <input type="checkbox"/> ASSET MANAGEMENT <input type="checkbox"/> FINANCE COMPANY		
<input type="checkbox"/> TRUST & WILLS	<input type="checkbox"/> STOCK BROKING <input type="checkbox"/> FINANCIAL ADVISORY	<input type="checkbox"/> NON FINANCE CORPORATION	<input type="checkbox"/> ACADEMIA <input type="checkbox"/> STUDENT

4. OTHER INFORMATION

- | | | |
|--|------------------------------|-----------------------------|
| 1. Have you ever been charged or convicted in a court of law, or are there any pending charges? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. Have you had a business related licence, registration or membership revoked, denied or suspended? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. Are you an undischarged bankrupt or ever been declared bankrupt? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. Have you ever been refused membership of a statutory professional or other body in respect of your professional capacity? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. Have you ever been subject to disciplinary proceeding or expelled by a statutory body in respect of your professional capacity? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 6. Have you ever been dismissed or had a proper authority withdrawn on ethical or legal grounds? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 7. Have you ever have past or pending claims made against your professional indemnity insurance in relation to financial advice? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Note: If you have answered YES to any of the above questions, please attach relevant documents which provide full details of the matters.

5. PAYMENT

Payment to : **FINANCIAL PLANNING ASSOCIATION OF MALAYSIA**

Application fee : ☐ **RM150** - January to December ☐ **RM75** - July to December

☐ By Cash ☐ By Cheque : _____

☐ By Credit Card (Direct Debit) ☐ VISA ☐ MASTER ☐ AMEX (for AMEX card holder : 4 digit bank code on front of card _____)

Card number : _____ Card Expiry date: _____

6. DECLARATION (BY APPLICANT)

I hereby declare that all information is true to the best of my knowledge, and I understand FPAM reserves the rights to verify information I have provided in this form. I agree to adhere by FPAM's Professional Code of Ethics & Professional Responsibilities.

Signature : _____ Date : _____

Approved By : _____

AFPM No. : _____



UNIT 305, BLOCK A, PHILEO DAMANSARA I
JALAN 16/11, OFF JALAN DAMANSARA
46350 PETALING JAYA, SELANGOR
TEL : 03 - 7954 9500
FAX : 03 - 7954 9400
WEBSITE: www.fpam.org.my

TARUC STUDENTS

For office use only

Expiry date	
Discrepancy	
Approve for entry	
O/R #	

GST TAX FILE NO. :000173154304

REGISTRATION FOR THE CERTIFICATION PROGRAM EXAMINATIONS

Complete in full using BLOCK LETTERS

This form must be submitted within the following timeframe:

- To FPAM - 7 weeks before the examination date
- To Education Providers - 8 weeks before the examination date

Late submission after the closing date would be subjected to a late registration of RM50.00

FPAM has the sole discretion:

- To switch candidates to another examination venue if insufficient candidates are registered at the preferred examination venue and;
- To allocate the examination venue if the venue has not been chosen. FPAM's decision is final.

Name:		New I/C No.:	
Membership No: (Trade/Associate Member)	Education Provider: (To be stamped by TARUC)		
Module	Exam session	First Sitting	Re-sitting
			KL - KUALA LUMPUR
			PG - PENANG
			KK - KOTA KINABALU (June/July session only)
			KCH - KUCHING (Dec session only)
M4 (Candidate is required to complete the work experience summary form, please request form from EP or FPAM)			JB - JOHOR BAHRU

IMPORTANT REMINDER

- Please ensure that your membership is valid at time of registration and upgrade your membership if necessary.
- You must be an Associate Member to register for Modules 2 to 4. (Except for Challenge Status candidates).
- All candidates must be enrolled in a CFP certification Program with Approved Education Providers.

*Exam Fees Payable	RM	Office Contact:	Fax No.:
By Cash		Mobile No.:	Email :
Online / ATM transfer to FPAM Alliance Bank account no: 1210 9001 0005 395 or Maybank account no: 5140 7512 8677 (Please provide copy of payment receipt for tracking)			
Credit Card No.:	Card type: VISA / MASTER / DINERS / AMEX		
*Card Expiry date:	*CCV number:	for AMEX card holder (pls provide 4 digits bank code on front of card)	

* Required fields

**Candidate/Card holder's signature
authorizing credit card direct debit**

	Module 1 / Module 2 / Module 3 (A)	Module 4 (B)	Admin & Resource Fee (C)	M1/M2/M3 Total = (A)+(C)	M4 Total = (B)+(C)
*Exam Fees Payable	RM250	RM500	RM150	RM400	RM650

FPAM will not entertain any request for cancellation or postponement of examination by candidates after receipt of this Examination Registration form. No refund of the examination fees will be made under any circumstances.



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46350 PETALING JAYA, SELANGOR
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WEBSITE: www.fpam.org.my

NON TARUC STUDENTS

For office use only

Expiry date	
Discrepancy	
Approve for entry	
O/R #	

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* Required fields

*Exam Fees Payable	Module 1 / Module 2 / Module 3 (A)	Module 4 (B)	Admin & Resource Fee (C)	M1/M2/M3 Total = (A)+(C)	M4 Total = (B)+(C)
Charter Members rate	RM250	RM500	RM150	RM400	RM650
Corporate Members rate	RM300	RM600	RM150	RM450	RM750
Individuals (Public)	RM350	RM700	RM150	RM500	RM850

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TO BE COMPLETED BY CHARTER OR CORPORATE MEMBER

**** (If no endorsement from employer is provided in the space below, candidates will be considered as individuals (Public))**

We certify that the candidate named in this registration form is an employee or agent of our company.

Signature

Name & Designation
General Manager or Branch Manager
Date:

Company Stamp