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TUNKU ABDUL RAHMAN UNIVERSITY OF MANAGEMENT AND TECHNOLOGY

TAR UMT CPE
CENTRE FOR CONTINUING & PROFESSIONAL EDUCATION

CERTIFIED FINANCIAL PLANNER (CFP)

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.

WHY CFP?

Global Recognition

Obtain the most internationally prestigious and globally recognized financial planning designation

Enhance Career Development Opportunities

Business strategy is an action taken on the basis of decision making by the company to achieve its business targets and goals.

Personal Enrichment

Gain insights on securing your personal growth and financial dreams.

Knowledge and Competencies

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

Satisfied Clients

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

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:

Module	TAR UMT Student/Alumni/Staff	Public
Module 1	RM 680	RM 800
Module 2	RM 680	Rm 800
Module 3	RM 680	RM 800
Module 4	RM 680	RM 800
Payment to TAR UMT is inclusive of tuition fees, additional notes (soft copy) & prevailing SST (8%). Prices are subject to change without prior notice.		

*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 (Module 1 participant)	RM 50.00 (January - December) RM 25.00 (July - December)
Associate Member (Module 2 - Module 4 participant)	RM 150.00 (January - December) RM 75.00 (July - December)

Examination Fees:

	Module 1 , 2, 3	Module 4
TAR UMT Student/Alumni/Staff	RM 250	RM 500
Employee of Charter Member	RM 250	RM 500
Employee of Corporate Member	RM 300	RM 600
Public	RM 350	RM 700

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

- 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	RM 410.00 (January - December)

* Fees paid to FPAM

COURSE DETAILS

Particulars	Certified Financial Planner Module 1: Foundation in Financial Planning and Tax Planning	Certified Financial Planner Module 4: Financial Plan Construction and Professional Responsibilities
Intake Date	22 September — 1 December 2024 (*Every Sunday)	29 September — 1 December 2024 (*Every Sunday)
Time	10.00am - 5.00pm	
Duration	48 hours	
Registration Deadline	9 September 2024	17 September 2024
Study Mode	*Online Part-Time Weekend Classes	
Course Fees	TAR UMT Students/Alumni/ Staff - RM 680.00 Public - RM 800.00 *inclusive of 8% SST	
	Inclusive of Course Materials (soft copy) FPAM Manual	
Examination Date	**CFP Module 1 :** 14 December 2024	
	CFP Module 4 : 14 & 15 December 2024	

FOR ENQUIRIES & REGISTRATION, PLEASE CONTACT:

TUNKU ABDUL RAHMAN UNIVERSITY OF MANAGEMENT & TECHNOLOGY
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