



**TARUMT**  
TUNKU ABDUL RAHMAN UNIVERSITY OF  
MANAGEMENT AND TECHNOLOGY



# 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	TARUMT Student/ Alumni/ Staff	Public
	Module 1	RM600	RM800
	Module 2	RM600	RM800
	Module 3	RM600	RM800
	Module 4	RM600	RM800
Payment to TARUMT 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 (Module 1 participant)	RM50.00 (January—December)	RM25.00 (July—December)
	Associate Member (Module 2 – Module 4 participant)	RM150.00 (January—December)	RM75.00 (July—December)
Examination Fees:		<b>Module 1, 2, 3</b>	<b>Module 4</b>
	TARUMT Student/ Alumni/ Staff	RM250	RM500
	Employee of Charter member	RM250	RM500
	Employee of Corporate member	RM300	RM600
	Public	RM350	RM700

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	RM410.00 (January—December)
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\* Fees paid to FPAM

# COURSE DETAILS

<b>Particulars</b>	<b>Certified Financial Planner Module 1: Foundation in Financial Planning and Tax Planning</b>
	<b>Certified Financial Planner Module 4: Financial Plan Construction and Professional Responsibilities</b>
<b>Intake Date</b>	10 September — 26 November 2023 (*Every Sunday)
<b>Time</b>	10.00am - 5.00pm
<b>Duration</b>	48 hours
<b>Registration Deadline</b>	29 August 2023
<b>Study Mode</b>	*Online Part-Time Weekend Classes
<b>Course Fees</b>	TAR UMT Students/Alumni/ Staff - RM 600.00 Public - RM 800.00 *inclusive of 6% SST
	<ul style="list-style-type: none"> <li>✓ Inclusive of Course Materials (soft copy)</li> <li>✓ FPAM Manual</li> </ul>
<b>Examination Date</b>	<b>CFP Module 1:</b> 9 December 2023
	<b>CFP Module 4:</b> 9 & 10 December 2023

## 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](mailto:cpe@tarc.edu.my)

Website: [www.tarc.edu.my](http://www.tarc.edu.my)



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