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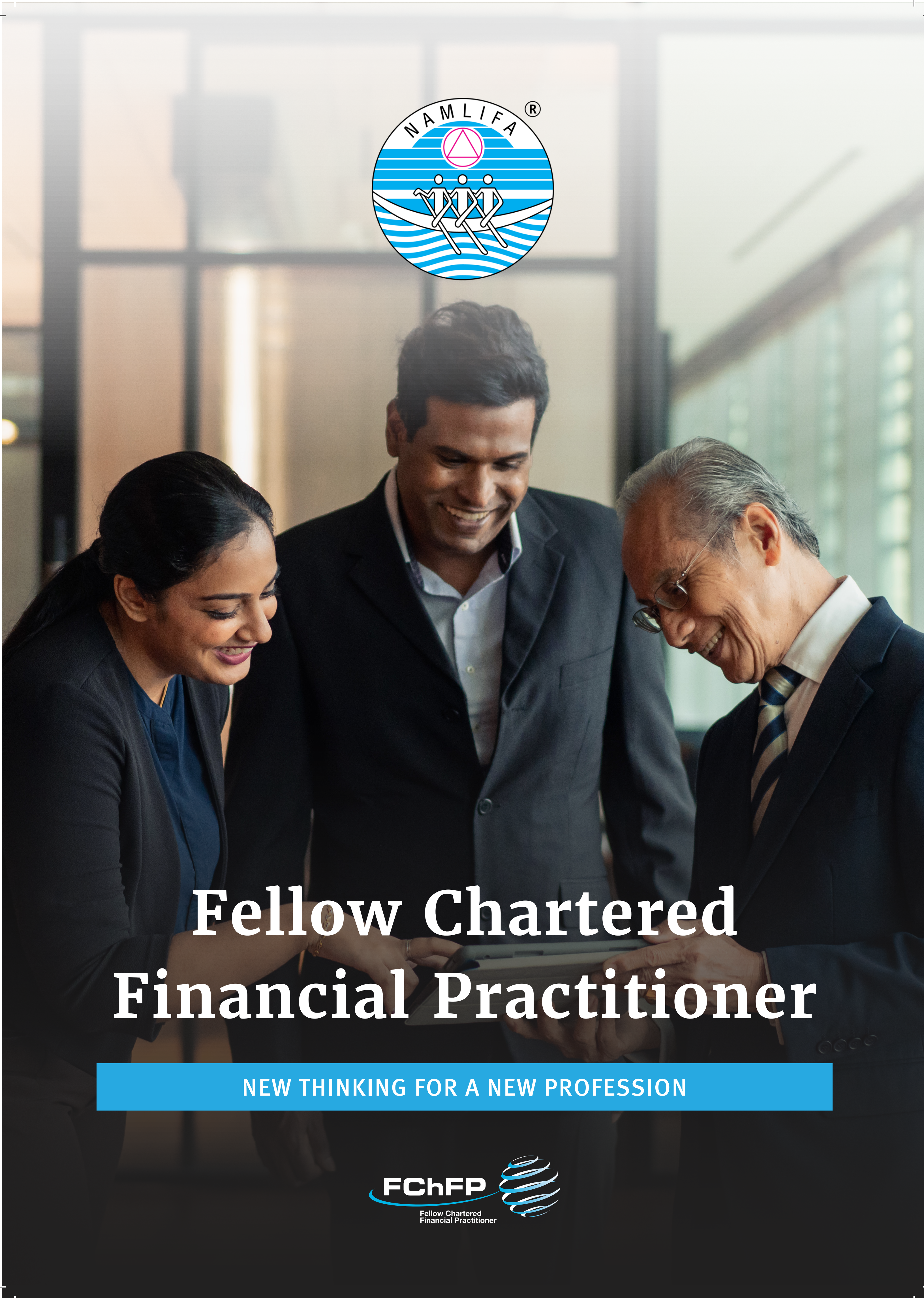

Fellow Chartered Financial Practitioner

NEW THINKING FOR A NEW PROFESSION

FChFP
Fellow Chartered
Financial Practitioner

Programme overview

The FChFP Certification introduces financial services practitioners and executives to the products, markets and regulatory environment for the financial services industry in Malaysia. Participants will gain an understanding of the step-by-step process of providing professional financial advice to clients in the areas of investments, insurance, retirement and estate planning. The assessments encourage progressive learning and develop technical, interpersonal, ethical and client engagement skills, enabling individuals to build their knowledge and skills as they move through the course.

Invest in your professional growth

In an ever-evolving financial landscape, continuous learning is a positive essential step towards developing your professional growth. Not only enhancing your credibility as an advisor but also ensuring the currency of your knowledge with industry trends and regulations, keeping you at the forefront of the financial world.

Programme details

Entry requirements

Participants enrolling in the FChFP Certification must meet the following experience requirements:

Minimum two (2) years' relevant industry experience. It is expected that individuals will also have a fundamental understanding of financial planning, insurance and wealth management concepts.

Delivery

Blended learning, including face-to-face lectures through intensive workshops, delivered by international and local practitioners, and online tools and resources supported by Kaplan Professional's Learning Management System.

Option A – 1 week intensive, face-to-face

Week 1: 5 x 8-hour workshops (in person)

Week 2: Exam (in person)

Week 3: Assignment due (online)

Option B – 5 weeks, face-to-face

Week 1-5: 1 x 8-hour workshop (in person)

Week 6: 1 x 3-hour exam revision (online) + exam (in person)

Week 7: Assignment due (online)

Option C – 5 weeks, live online

Weeks 1-5: 2 x 4-hour workshops (online)

Week 6: 1 x 3 hour exam revision (online) + exam (in person)

Week 7: Assignment due (online)

Duration

The FChFP Certification is completed over a three (3) week period, consisting of one (1) week of intensive workshops (5 x full days), one (1) week to complete the exam and one (1) week to complete the assignment. Candidates must not exceed the certification progression timeframe of one (1) year. All subjects need to be completed in ascending order.

Programme fees

Tuition fee: MYR 3500 (ex SST)*

Certification fee (payable to APFinSA): SGD 375 (ex SST)

**Special introductory price*

Subjects

FChFP1: Introduction to financial planning

FChFP2: Personal and business insurance planning

FChFP3: Investment and retirement planning

FChFP4: Estate and tax planning

FChFP5: Financial planning in practice (Capstone)

Assessment

To successfully complete the FChFP Certification, participants must achieve a pass mark of at least 50%.

- One (1) multiple-choice exam
- One (1) practical case-study assignment

Completion

The Fellow Chartered Financial Practitioner Certification will be awarded by APFinSA on successful completion.

Learning outcomes

- Understand the characteristics and needs of individuals and businesses across wealth management, protection and distribution.
- Establish and maintain client relationships as an ethical and trusted financial adviser.
- Develop strategies for clients across wealth management, protection and distribution.
- Prepare, present and implement financial planning recommendations.

What you will gain

Stand out from your peers and maintain your relevance with a higher professional qualification.

❖

Enhanced technical knowledge and practical skills to inspire confidence in yourself and your clients.

❖

Develop quality advice strategies to empower your clients to achieve their financial aspirations.

❖

Ability to apply empathy and authenticity to create more engaging client experiences.

Incorporated in 1978, the National Association of Malaysian Life Insurance and Family Takaful Advisors (NAMLIFA) is the premier organisation for life insurance professionals and financial planners/practitioners. NAMLIFA has promoted excellence in the industry by advocating for higher ethical and professional standards so that more Malaysians seek out NAMLIFA members to build, grow and protect their wealth.

Kaplan Professional is Australia's leading provider of specialist financial services education and training. We are renowned for the quality of our programmes, practical learning outcomes, dedicated student support and flexible online learning. Our progressive and customer-focused approach has cemented Kaplan Professional Australia's reputation as the trusted education partner to all the major financial institutions in the country and over 45,000 working professionals annually.

The Asia Pacific Financial Services Association (APFinSA) is the largest financial services council in the Asia Pacific. APFinSA represents the voice and interests of over 100,000 financial services professionals from its member countries and serves as the leading cross-border association to respond to critical issues and opportunities facing the financial advice profession in the region.

Course Provider: National Association of Malaysian Life Insurance and Family Takaful Advisors

Course Developer: Kaplan Professional Australia

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