THE MALAYSIAN INSURANCE INSTITUTE

Registered Financial Planner (RFP) Train The Trainer Course

RFP TRAIN THE TRAINER COURSE

OBJECTIVE OF THE TRAINING

- To provide trainers the fundamentals of facilitating a class and ensuring professionalism in the delivery of the subject.
- To provide a better understanding and effective delivery of the subject.
- To provide an overview and effective use of the standardized presentation slides provided.

EDUCATIONAL SERVICE PROVIDER OF THE YEAR 2012

PROFESSIONAL SERVICE PROVIDER OF THE YEAR 2007

AREAS COVERED

- Refresher on the Fundamental of Training
- Overview of the RFP Module Contents
- Overview of the RFP Module Presentation Slides

CERTIFICATION

Certification as certified RFP Trainer for the specific module will be given by MFPC upon satisfactory completion of the course (80% attendance) and passing the RFP examination.

COURSE SCHEDULE

RFP Module 1	**11 to 13 March 2019** **(Closing date : 18 February 2019)**
RFP Module 2	**8 to 9 April 2019** **(Closing date : 19 March 2019)**

PARTICIPANTS SELECTION CRITERIA

- Posses relevant tertiary education or recognised professional qualification;
- Some teaching experience with acceptable teaching competency;
- Proven knowledge base of the subject(s);
- Ability to lecture and conduct tutorials;
- Ability to assess students' assignments, examination, etc;
- Ability to communicate effectively in English or Bahasa Malaysia or Mandarin where such RFP programmes are conducted in the respective languages;
- The ability to relate to students from a variety of backgrounds ;
- Has undergone the MII-RFP Course.

FEES	CLASS SIZE	MEDIUM OF INSTRUCTION
RFP Module 1 - RM 1,500 **RFP Module 2 -** RM 953	Recommendation for each class is 25 trainers	English

COURSE OUTLINE

Module 1 – Fundamentals of Financial Planning

1. Financial Planning Environment, Phenomenon and Process
2. The Regulatory Environment for Financial Planners
3. Ethics and Professionalism
4. Personal Financial Statements
5. Cash Flow Management
6. Time Value of Money
7. The Economic Environment and its Impact on Financial Planning
8. Risk Tolerance
9. Investment Planning
10. Tax Planning
11. Risk Management and Life Insurance Planning
12. Estate Planning Issues, Process, Personalities and Instruments
13. Retirement Planning Tools and Processes

Module 2 – Risk Management and Insurance Planning

1. Understanding Risks
2. Risk Management
3. Insurance Needs Analysis
4. Life Insurance Policies
5. Health Insurance Policy Analysis
6. Annuities
7. General Insurance Products in Insurance Planning
8. Takaful
9. Legal Principles and Relevant Legislation in Insurance
10. Consumer Protection and Life Insurance Industry Code of Practice
11. The Financial Sector Master Plan
12. SOCSO

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