CFP Application Checklist for Challenge Status

- FPAM Trade member application form (RM50.00 per year) - The request for approval must be accompanied by an Application for Trade member form together with payment (if applicant is not currently a member) as FPAM will only grant approval to members only.
- FPAM CFP Challenge Status application form – see full details in the application form.
- Certified certificates and academic transcripts – all must be certified.
- Reference letter/testimonial from employer - Working experience from present employer must be under the employer's letterhead.
- Resume if applicable.

Please note:

- Applications for exemptions or challenge status must be submitted together with your examination registration form. Failure to comply might result in your application not being processed in time for your next examination.
- Those seeking for exemptions or challenge status must apply at least one month before the registration deadline for any examination.
- Upon approval, students will be allocated a reference number to quote when they subsequently register for the examination. If a member application is not approved, FPAM will return the whole set of documents back to the member.

Qualifications required:

Members having the following qualifications and/or professional credentials and have gained 3 years of personal finance related experience are eligible to apply for the CFP challenge status. This CFP challenge status is only open to Malaysians.

1. Qualifications Professional accountants (MIA, CPA (M), CPA(Aust)., AICPA, CA , ACCA, ICMA and AIA.) Company Secretaries (ICSA & Fellow of MACS) Chartered Financial Consultants Chartered Financial Analysts Doctorate in Business Admin PhD (business, accounting or economics) Masters (Business Admin /Finance /Economics/Accounting) from accredited universities

2. Members must have gained 3 years of personal finance related experiences at the time of application where such experiences gained can enhance the candidate's ability to apply the financial planning process to meet consumer needs. This experience can be gained in one or all of the following areas: Insurance, mutual funds, securities, asset management, accounting, estate planning, banking, taxation, trusts, retirement planning and financial planning.

3. Each member is entitled to a maximum of three (3) consecutive examination attempts only for the challenge status commencing immediately after obtaining approval from FPAM. After the 3 attempts or non attempts, they must enroll for the normal CFP certification examinations.