

Sample of Testimonial Letter for membership application
Please print on Company's Letterhead. Original copy of letter must be sent to FPAM.
Fax copy alone will not be entertained.

Date:

Membership Department
Financial Planning Association of Malaysia
Lot 16-02, 16th Floor
Block B, HP Towers
(Formerly known as Wisma Semantan)
No. 12 Jalan Gelenggang
Bukit Damansara
50490 Kuala Lumpur

Dear Sir,

Re: Reference Letter

I would like to apply for membership in the Financial Planning Association of Malaysia. I am currently self-employed/sole proprietor/partner/director of
(Name of firm/company)

Please give a brief description of own company and nature of business or services provided and also number of years self employed. Please enclose copy of Registration Form for company from the Registrar of Business, Malaysia for our files.

Note:

Please indicate job responsibilities/services provided and a brief description of responsibilities/services provided and also allow 1 paragraph for each job responsibility /services provided. This letter should cover a period of at least 3 years within the 5 years preceding the date of this letter. If the applicant has self employed for less than 3 years, he/she is required to obtain a testimonial letter from his/her prior employer(s).

The number of points listed below is a sample only and is not exhaustive. Please provide complete list of job responsibilities/services provided.

- 1. Provision of Financial Planning Services**
Briefly describe nature and scope of services rendered.

2. Provision of Accounting Services

Briefly describe nature of services rendered.

3. Tax Advisory Services

Briefly describe nature of services rendered.

I am a member of(Please list name of professional bodies of which applicant is a member).

Thank you for your consideration.

Yours sincerely,

Name:

IC No:

(Other than the testimony of the applicant, this letter should also be co-signed and attested by a CFP certificant or a member of the Malaysian Institute of Accountants).

Name:

IC No:

CFP/MIA No: