

# **Financial Planning Association of Malaysia**

## **Core Model Group of Licensed Financial Planners Application Procedures**

### **Step 1**

Candidates to apply to CMSL companies to be eligible for the program.

#### **Prerequisite**

All participants must possess a Bachelor Degree in any discipline. Interested participants without a Bachelor Degree but with a minimum SPM qualification with 5 years of full time working experience in the financial services sector can register for the program if they pass the Prior Learning Recognition Assessment conducted by FPAM.

Interested candidates must be either:

- 1) Outside the industry
- 2) Retrenched bank or corporate staff
- 3) Fresh graduates
- 4) Qualified women returning to work
- 5) Unit Trust & Insurance agents who have left the industry for at least a year

### **Step 2**

Upon acceptance by the CMSL company, candidates is to complete application form and attach curriculum vitae, copy of academic certificates and proof of work experience (i.e. letter from employer(s) verifying work experience). Candidates are also required to write a short submission (approximately 300 words) on why they would like to participate in the program.

### **Step 3**

CMSL companies to compile application forms and submit to FPAM for selection process.

### **Step 4**

Committee to review applications and select candidates

### **Step 5**

FPAM will inform successful candidates of their application status.

### **Step 6**

FPAM will send agreement for program to candidate and employer  
Candidates to sign agreement and submit Guarantor Letter and Bond letter with employer  
Successful candidates to register for the CFP certification program.  
FPAM will liaise with Education Provider directly on payment.