# EXEMPTION TABLE : MODULE BY MODULE (RFP)

| Academic/Professional Qualifications | Module 1 | Module 2 | Module 3 | Module 4 | Module 5 | Module 6 |
|---|---|---|---|---|---|---|
| | Fund. of FP | Risk Mgt/Ins.P | Inv. Planning | Tax Planning | Est. Planning | Ret. Planning |
| **Financial Planning**** | | | | | | |
| **FChFP – Fellow, Chartered Financial Practitioner** | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ |
| **ChFC – Chartered Financial Consultant** | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ |
| **EFP – European Financial Planner** | ☑ | ☑ | ☑ | | ☑ | ☑ |
| **Dip.FP(MII) – Diploma in Financial Planning** | ☑ | ☑ | ☑ | ☑ | ☑ | |
| **CIFP (INCEIF) – Certified Islamic Financial Professional** | ☑ | | ☑ | | | |
| **CFP – Certified Financial Planner** | ☑ | ☑ | ☑ | | ☑ | ☑ |
| **RFC – Registered Financial Consultant** | **No exemption** | | | | | |
| ***All Professional Financial Planning Programme – will be granted for maximum 6 modules* | | | | | | |
| | | | | | | |
| **Insurance (Home Office/Actuarial)** | | | | | | |
| **FIA – Fellow, Institute of Actuaries (UK)** | ☑ | ☑ | ☑ | | | ☑ |
| **FSA – Fellow, Society of Actuaries (US)** | ☑ | ☑ | ☑ | | | ☑ |
| **AAII – Associate Australia Insurance Institution** | | ☑ | | | | |
| **FAII – Fellow, Australia Insurance Institution** | | ☑ | | | | |
| **NZIIF - New Zealand Insurance Institution(Sr.Assoc)/Fellow** | | ☑ | (Fellow only) | | | |
| **ACII/FCII – Associateship / Fellowship Chartered Insurance Institute** | | ☑ | ☑ | | | |
| **AMII/FMII – Associateship/Fellowship of The Malaysian Insurance Institute** | | ☑ | ☑ | | | |
| | | | | | | |
| **Insurance (Field/planners/Life Agency)** | | | | | | |
| **ChLP – Chartered Life Practitioner** | ☑ | ☑ | | | | ☑ |
| **CLU – Chartered Life Underwriting** | ☑ | ☑ | | | | ☑ |
| **LUTCF – Fellow, Life Underwriter Training Council** | | ☑ | | | | |
| **FCLP – Fellow, Chartered Life Practitioner** | | ☑ | | ☑ | | |
| **FLMI – Fellow, Life Management Institute** | | | ☑ | | | |
| **CLPM – Certified Life Planner & Marketeer** | | ☑ | | | | |
| **ChIFP – Chartered Investment and Finance Practitioner** | ☑ | | ☑ | | | ☑ |
| **CFA – Chartered Financial Analyst** | | | ☑ | | | ☑ |
| | | | | | | |

**EXEMPTION TABLE : MODULE BY MODULE (RFP)**

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| **Accounting Designations** | | | | | | |
| **MIA – Malaysian Institute of Accountants** | | | ☑ | ☑ | | |
| **ACCA – Association of Certified and Chartered Accountants** | | | ☑ | ☑ | | |
| **CIMA – Chartered Institute of Management Accountants** | | | ☑ | ☑ | | |
| **CPA Australia – Certified Practice Accountant Australia** | | | ☑ | ☑ | | |
| **MICPA – Malaysian Institute of Certified Public Accountants** | | | ☑ | ☑ | | |
| **NIA – National Institute of Accountants** | | | ☑ | | | |
| **AIA – Association of International Accountants** | | | ☑ | | | |
| | | | | | | |
| **Banking** | | | | | | |
| **AIB - Academy of International Business (Personal Banking)** | | | ☑ | | | |
| **PKMC – Pasaran Kewangan and Malaysia Certificate** | | | ☑ | | | |
| **DBFS – Diploma in Banking and Financial Services (pass Treasury & Investment)** | | | ☑ | | | |
| **DBF – Diploma in Banking and Finance (pass Financial Management)** | | | ☑ | | | |
| | | | | | | |
| **Secretarial & Admin** | | | | | | |
| **ICSA – Institute of Chartered Secretaries and Administrators** | | | ☑ | ☑ | | |
| **MACS – Malaysian Association of Companies Secretaries** | | | ☑ | | | |
| **AACS – Annual Approved Company Secretaries** | | | ☑ | | | |
| | | | | | | |
| **Legal** | | | | | | |
| **LLB (Local) - Bachelor of Legal Letters** | | | | ☑ | | |
| **Marketing & Sales** | | | | | | |
| **CFMC – Certified Financial Marketing Consultant (effective 2005)** | ☑ | ☑ | | | ☑ | ☑ |
| | | | | | | |

## EXEMPTION TABLE : MODULE BY MODULE (RFP)

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| **Help University** | | | | | | |
| **Bachelor of Business (Finance) (Hons)** | | | | | | |
| **– Personal Financial Planning in Malaysia (MPU3353)** | ☑ | | | | | |
| **– Financial Management FIN202** | | | ☑ | | | |
| **– Investment Analysis & Decision Making FIN204** | | | ☑ | | | |
| **– Wealth Management FIN205** | | | ☑ | | | |
| **– Analysis of Equity & Fixed Income Investments FIN302** | | | ☑ | | | |
| **– Global Financial Management FIN304** | | | ☑ | | | |
| **– Portfolio Management FIN307** | | | | | | |
| | | | | | | |
| **INTI International University, Nilai** | | | | | | |
| **Bachelor of Financial Planning (Hons.) – (17th September 2009)** | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ |
| | | | | | | |
| **Business Studies** | | | | | | |
| **Multimedia University (MMU)** | | | | | | |
| **B. Accountancy (Hons.) – (4th May 2007)** | | | | | | |
| **BBA (Hons.) Banking & Finance** | | | | | | |
| **Bachelor of Law (Hons.)** | | | | | | |
| **– BBF 2253 Investment** | | | ☑ | | | |
| **– BAC 2097 Taxation 1 & BAC 3027 Taxation 2** | | | | ☑ | | |
| **– BEQ 3014 Equity and Trust 1 & BEQ 3024 Equity and Trust 2** | | | | | ☑ | |
| | | | | | | |
| **Open University Malaysia (OUM)** | | | | | | |
| **Bachelor of Business Administration – (3rd September 2009)** | | | | | | |
| **– BBPE4103 Estate Planning** | | | | | ☑ | |
| **Executive Master in Financial Planning** | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ |
| | | | | | | |
| **Taylor's University** | | | | | | |
| **Twinning prog. with University of West England (UWE) – (2nd February 2010)** | | | | | | |
| **– Bachelor of Art (Hons) Accountancy & Finance** | | | ☑ | ☑ | | |
| | | | | | | |

## EXEMPTION TABLE : MODULE BY MODULE (RFP)

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| Twinning prog. with University South Australia (UNISA) – (2nd February 2010) | | | | | | |
| – Bachelor of Commerce and Bachelor of Applied Finance | | | ☑ | ☑ | | |
| | | | | | | |
| Tunku Abdul Rahman University College (TAR UC) – (15th January 2009) | | | | | | |
| Diploma in Commerce (Financial Accounting) | | | | ☑ | | |
| Diploma in Business Studies (Accounting) | | | | ☑ | | |
| Diploma in Business Studies (Finance and Investment) – (March 2012) | ☑ | ☑ | ☑ | ☑ | | |
| Diploma in Business Studies (Banking and Finance) – (March 2012) | ☑ | ☑ | ☑ | ☑ | | |
| Advance Diploma in Commerce (Financial Accounting) | | | | ☑ | | |
| Advance Diploma in Business Studies (Accounting) | | | | ☑ | | |
| Advance Diploma in Commerce (Business Management) | | | | ☑ | | |
| Advance Diploma in Business Studies (Finance and Investment)–(March 2012) | ☑ | ☑ | ☑ | | | |
| Advance Diploma in Business Studies (Banking & Finance) – (March 2012) | ☑ | ☑ | ☑ | ☑ | | |
| | | | | | | |
| UCSI University | | | | | | |
| Executive Master in Financial Planning and Management | ☑ | ☑ | ☑ | ☑ | ☑ | ☑ |
| | | | | | | |
| Universiti Malaya (UM) – (8th April 2010) | | | | | | |
| Bachelor of Economics | | | | ☑ | | |
| Bachelor of Business Administration | | | | | | |
| – CBEB2321 Applied Financial Planning | ☑ | | | | | |
| – CBEB3301 Risk Management & Insurance | | ☑ | | | | |
| – CBEB3302 Investment | | | ☑ | | | |
| | | | | | | |
| Universiti Pendidikan Sultan Idris (UPSI) | | | | | | |
| MBA programme (major in Financial Planning) – (24th July 2009) | ☑ | ☑ | ☑ | | | |
| | | | | | | |
| Bachelors of Business Administration (Financial Services) | | | | | | |
| - Fundamentals of Financial Planning (PFM3034) | ☑ | | | | | |
| - Insurance Planning and Takaful Planning (PBF3013) | | ☑ | | | | |
| - Banking and Financial Institutions(PBF3023) | | | ☑ | | | |

## EXEMPTION TABLE : MODULE BY MODULE (RFP)

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| **- Zakat & Tax Planning (PAT 3053)** | | | | ☑ | | |
| **- Estate Planning (PFM 3093)** | | | | | ☑ | |
| **- Retirement Planning (PFM 3083)** | | | | | | ☑ |
| | | | | | | |
| **<u>Universiti Utara Malaysia (UUM)</u>** | | | | | | |
| **Faculty of Accounting & Finance – (3rd September 2009)** | | | | | | |
| **Bachelor of Accounting (Hons)** | | | | | | |
| **- BKAT 2013 Principle of Taxation** | | | | ☑ | | |
| **Bachelor of Accounting (Information System) (Hons)** | | | | | | |
| **- BKAT 2013 Principle of Taxation** | | | | ☑ | | |
| **Bachelor of Banking (Hons)** | | | | | | |
| **- BWFF 3073 Personal Finance** | ☑ | | | | | |
| **- BKAT 2013 Principle of Taxation** | | | | ☑ | | |
| **Bachelor of Finance (Hons)** | | | | | | |
| **- BWFF 3073 Personal Finance** | ☑ | | | | | |
| **- BWRR 3033 Risk Management or BWRR 3013 Investment Analysis** | | ☑ | | | | |
| **- BWFN 3013 Investment Analysis** | | | ☑ | | | |
| **- BKAT 2013 Principle of Taxation** | | | | ☑ | | |
| **Bachelor of Risk Management and Insurance (Hons)** | | | | | | |
| **- BWRR 3033 Risk Management or BWRR 3013 Investment Analysis** | | ☑ | | | | |
| **- BWFF 3073 Personal Finance** | ☑ | | | | | |
| **- BKAT 2013 Principle of Taxation** | | | | ☑ | | |
| **Bachelor of Islamic Finance and Banking (Hons)** | | | | | | |
| **– BWFF3073 Personal Finance** | ☑ | | | | | |
| **– BWRR3033 Risk Management** | | ☑ | | | | |
| **– BWRR1013 Risk and Insurance** | | ☑ | | | | |
| **– BWFN3013 Investment Analysis** | | | ☑ | | | |
| **– BKAT2013 Principle of Taxation** | | | | ☑ | | |
| **– BWRR3103 Estate Planning** | | | | | ☑ | |
| **– BWRR3113 Retirement Planning** | | | | | | ☑ |

# EXEMPTION TABLE : MODULE BY MODULE (RFP)

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| Accounting, Finance, Business Programme | | | | | | |
| - WFF3073 Personal Finance | ☑ | | | | | |
| - WRR 3033 Risk Management | | ☑ | | | | |
| - WRR 1013 Risk and Insurance | | ☑ | | | | |
| - WFN 3013 Investment Analysis | | | ☑ | | | |
| - KAT 2013 Principle of Taxation | | | | ☑ | | |
| - WRR 3103 Estate Planning | | | | | ☑ | |
| - WRR 3113 Retirement Planning | | | | | | ☑ |
| | | | | | | |
| University Malaysia Terengganu (UMT) | | | | | | |
| Bachelor of Accounting – (31st December 2010) | | | | | | |
| – FIN3101 Financial Management | | | ☑ | | | |
| – FIN3103 Corporate Finance | | | ☑ | | | |
| – ACC3401 Taxation 1 | | | | ☑ | | |
| | | | | | | |
| University Putra Malaysia (UPM) | | | | | | |
| UPM Degree Programme: Personal Financial Planning – (19th May 2011) | | | | | | |
| – GSM5461 Financial Planning | ☑ | | | | | |
| – GSM5421 Investment Analysis | | | ☑ | | | |
| Bachelor of Consumer Studies (Finance) – (29 March 2013) | | | | | | |
| – PSP 4308 Family Risk Management | | ☑ | | | | |
| – PSP 4309 Saving and Consumer Investment | | | ☑ | | | |
| – PSP 4307 Zakat and Individual Taxation | | | | ☑ | | |
| – PSP 3301 Household Financial Management | ☑ | | | | | |
| Degree Programme | | | | | | |
| - GSM 5461 Financial Planning | ☑ | | | | | |
| - GSM 5421 Investment Analysis | | | ☑ | | | |
| | | | | | | |

## EXEMPTION TABLE : MODULE BY MODULE (RFP)

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| <u>University Tenaga National (UNITEN)</u> | | | | | | |
| **BBA (Hons) in Finance – (13th May 2011)** | | | | | | |
| **– FICB373 Personal Financial Planning** | ☑ | | | | | |
| **– FICB333 Insurance and Risk Management** | | ☑ | | | | |
| **– FICB233 Investment** | | | ☑ | | | |
| | | | | | | |
| <u>University Tunku Abdul Rahman (UTAR)</u> | | | | | | |
| **Bachelor of Accounting (Hons)** | | | | | | |
| **Bachelor of Commerce (Hons) Accounting** | | | | | | |
| **Bachelor of Business Administration (Hons)** | | | | | | |
| **Bachelor of Business Administration (Hons) Banking and Finance** | | | ☑ | | | |
| **Bachelor of Business Administration (Hons) Entrepreneurship** | | | | | | |
| **- UBFB 3143 Personal Financial Planning and Management** | ☑ | | | | | |
| **Bachelor of Marketing (Hons)** | | | | | | |
| **Bachelor of Economics (Hons) Financial Economics** | | | | | | |
| **Bachelor of Economics (Hons) Global Economics** | | | ☑ | | | |
| **Bachelor of International Business (Hons)** | | | ☑ | | | |
| **Bachelor of Finance (Hons)** | | | | | | |
| **– UBFF2013 Business Finance** | ☑ | | ☑ | | | |
| **– UBFF3283 Portfolio Management** | | | ☑ | | | |
| **– UBFF3083 Financial Statement Analysis** | | | ☑ | | | |
| **– UBFF3253 Investment Analysis** | | | ☑ | | | |
| **– UBAT3013 Business Taxation** | | | | ☑ | | |
| **– UBAT2014 Taxation & UBAT3024 Advanced Taxation** | | | | ☑ | | |
| **– UBFB3143 Personal Financial Planning and Management** | ☑ | | | | | |
| **– UBFF3293 Risk Management** | | ☑ | | | | |
| **– UBFF3013 Corporate Finance** | | | ☑ | | | |
| **– UKFF3013 Corporate Finance** | | | | ☑ | | |
| **– UBFF3093 Futures and Options Analysis** | | | | | | |
| **– USCC1152 Managing Personal Finance** | | | | | | |
| **– UKAT2023 Taxation I** | | | | ☑ | | |

**EXEMPTION TABLE : MODULE BY MODULE (RFP)**

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| – UKAT3033 Taxation II | | | | ☑ | | |
| – UKAT3043 Taxation III | | | | ☑ | | |
| – UKFF1023 Financial Management Fundamentals | | | | ☑ | | |
| – UKFB3053 Financial Markets and Regulations | | | ☑ | | | |
| – UKFF2083 Financial Management | | | ☑ | | | |
| – UKFF4024 Multinational Finance | | | ☑ | | | |
| – UKEA3053 International Finance Management | | | ☑ | | | |
| – UKFF2013 Business Finance | | | ☑ | | | |
| – UKEA2083 International Financial Institutions | | | ☑ | | | |
| – UKFF3313 Strategic Financial Management | | | ☑ | | | |
| Master Of Business Administration (Corporate Management) | | | | | | |
| – MBFC15903 Corporate Finance | | | ☑ | | | |
| – MBFC17203 Financial Planning | ☑ | | | | | |
| – MBFC27303 Corporate And Personal Tax Planning | | | | ☑ | | |
| – MBFC17003 Investment Planning | | | ☑ | | | |
| – MBFC17103 Corporate Management | | ☑ | | | | |
| | | | | | | |
| Wawasan Open University (WOU) Malaysia | | | | | | |
| Bachelor of Accounting | | | | | | |
| – BAC308/05 Taxation in Malaysia | | | | ☑ | | |
| | | | | | | |
| Universiti Sains Islam Malaysia (USIM) | | | | | | |
| Bachelor of Muamalat Administration | ☑ | ☑ | ☑ | | | |
| Bachelor of Corporate Administration & Relation | | | ☑ | ☑ | | |
| Bachelor of Marketing Financial Services | ☑ | | ☑ | | ☑ | |
| Bachelor of Accountancy | ☑ | | ☑ | ☑ | | |
| | | | | | | |
| Universiti Sultan Zainal Abidin (UNISZA) | | | | | | |
| BBA Risk Management Takaful | | | | | | |
| - MIS 4063 Law of Insurance and Takaful | | ☑ | | | | |
| - MIS 3013 Introduction to Risk Management | | ☑ | | | | |
| | | | | | | |

## EXEMPTION TABLE : MODULE BY MODULE (RFP)

| Academic/Professional Qualifications | Module 1<br>Fund. of FP | Module 2<br>Risk Mgt/Ins.P | Module 3<br>Inv. Planning | Module 4<br>Tax Planning | Module 5<br>Est. Planning | Module 6<br>Ret. Planning |
|---|---|---|---|---|---|---|
| **Universiti Technologi Mara (UiTM) – (3rd January 2009)** | | | | | | |
| **Bachelor of Accountancy** | | | ☑ | ☑ | | |
| | | | | | | |
| **Nilai University** | | | | | | |
| **BA 3213 - Personal Finance** | ☑ | | | | | |
| **BA 3215 - Risk Management and Insurance** | | ☑ | | | | |
| **BA 3212 - Investments** | | | ☑ | | | |
| **BA 3323 - Advanced Taxation** | | | | ☑ | | |
| **BM 3217 - Corporate Law, Governance & Estate Planning** | | | | | ☑ | |
| **BA 3306 - Retirement Planning & Financial Management** | | | | | | ☑ |
| | | | | | | |