



# MFPC Continuing Professional Development (CPD) Programme Endorsement Guidelines

## Objectives

The objective of the Continuing Professional Development (CPD) is to raise the standard of competency and professionalism of financial planners and advisers. This SOP is to guide CPD Training Providers to submit their programme(s) for MFPC CPD endorsement.

## Guidelines on Programme Endorsement

### 1. Professional Association/Educational Institution offers professional and academic programme

- 1.1 Written endorsement application shall be submitted to the MFPC Secretariat at least **60 days** prior to the actual programme date.
- 1.2 Once credit evaluation is completed and exemption is approved by the Certificate and CPD Board (CCB), the professional programme shall be listed on MFPC exemption guideline for public reference.

### 2. Professional/Educational Institution offers CPD Programme (CPD Training Provider)

- 2.1 MFPC shall charge endorsement fee **RM212** for each **CPD programme** approved by the CCB.
- 2.2 CPD Training Provider shall be a **Corporate Member of MFPC**.
- 2.3 CPD Training Provider must submit endorsement application to the MFPC Secretariat at least **14 days** prior to the actual programme date.
- 2.4 The CCB will process CPD endorsement only if the following required documents have been submitted to MFPC Secretariat on time:
  - I. **Objectives and learning outcomes of the programme**
  - II. **Outline of the programme**
  - III. **Speakers' profile**
  - IV. **Speakers' identification card/passport number or a copy of photo stated identification card/passport**
  - V. **Programme Fee**
- 2.5 If **MFPC logo** is used for promotional brochure; the brochure must be submitted to the MFPC for approval prior to printing of the brochure.
- 2.6 Once the programme is approved as CPD programme; it'll be uploaded onto **MFPC website** under Monthly CPD Programmes.
- 2.7 Endorsed CPD programme shall be **email blasted** to MFPC members via **monthly CPD updates by last day of the month**.
- 2.8 CCB members and/or MFPC designated staff(s) could attend endorsed programme to learn and establish quality and standard of the cpd programme from time to time.
- 2.9 In this regard, CPD endorsement is meant to provide continuous learning experience for the MFPC members only; CPD Training Provider is not allowed to use this endorsement to market personal / company products to the audience.
- 2.10 Should the CPD Training Provider request further assistance on top of CPD endorsement; MFPC Secretariat shall seek endorsement from the Vice President, External Relations & Publicity on collaborative methodology.

### 3. Postponement and Cancellation of Endorsed CPD Programme

3.1 CPD Training Provider is required to notify the MFPC secretariat 7 days in advance for any postponement or cancellation of the endorsed programme.

3.2 Endorsement fee is non-refundable.

### 4. CPD Training Provider is offered with MFPC e-Marketing services

#### **MFPC e-marketing Rate**

No.	Item	Rate
1.	Dedicated email blast <b>(One Time)</b> – Active Ordinary and Student Members	RM 106
2.	SMS blast <b>(One Time)</b> – Active Ordinary Members	RM 530
3.	SMS blast <b>(One Time)</b> – Ordinary and Students Members	RM 1,060
4.	Website banner advertising and facebook advert <b>(per month)</b>	RM 106
5.	Website Main Banner advertising and facebook advert <b>(per month)</b>	RM 212

Note : 6% GST will be applicable and shown in Tax Invoice

### 5. CPD Programme application and submission

All enquiries and applications for CPD Programme endorsement shall be directed to the MFPC Secretariat at the following address;

**MALAYSIAN FINANCIAL PLANNING COUNCIL**  
**CPD Programme Endorsement**  
Unit 22.7, Level 22, Menara One Mont' Kiara (1MK)  
No. 1, Jalan Kiara, Mont' Kiara, 50480 Kuala Lumpur.

Tel: 03 – 6203 5899    Fax: 03 – 6201 2669  
Email: [mfpc@mfpc.org.my](mailto:mfpc@mfpc.org.my)    Website: [www.mfpc.org.my](http://www.mfpc.org.my)



# Application Form for MFPC CPD Programme Endorsement

You are required to complete this application form and submit relevant documents

No.	Information & Documents required for CPD programme endorsement																														
1.	Name of Programme:																														
2.	Date & Venue of the Programme:																														
3.	Objectives and Learning Outcomes of the Programme:																														
4.	Programme Outline:																														
5.	Lecturer(s)' Personal Profile & Identify Card/Passport Number or a copy of photo stated Identity Card / Passport:																														
6.	Programme Fee per participant:																														
7.	MFPC e-marketing services required: <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 5%;">No.</th> <th style="width: 70%;">Item</th> <th style="width: 15%;">Rate</th> <th style="width: 10%;">Tick</th> </tr> </thead> <tbody> <tr> <td>1.</td> <td>Dedicated email blast <b>(One Time)</b> – Active Ordinary and Student Members</td> <td>RM 106</td> <td></td> </tr> <tr> <td>2.</td> <td>SMS blast <b>(One Time)</b> – Active Ordinary Members</td> <td>RM 530</td> <td></td> </tr> <tr> <td>3.</td> <td>SMS blast <b>(One Time)</b> – Ordinary and Students Members</td> <td>RM 1,060</td> <td></td> </tr> <tr> <td>4.</td> <td>Website banner advertising and facebook advert <b>(per month)</b></td> <td>RM 106</td> <td></td> </tr> <tr> <td>5.</td> <td>Website Main Banner advertising and facebook advert <b>(per month)</b></td> <td>RM 212</td> <td></td> </tr> <tr> <td></td> <td><b>Total Fee</b> (Pls state if applicable)</td> <td style="text-align: center;"><b>RM</b></td> <td></td> </tr> </tbody> </table> <p>Note : 6% GST will be applicable and shown in Tax Invoice</p>			No.	Item	Rate	Tick	1.	Dedicated email blast <b>(One Time)</b> – Active Ordinary and Student Members	RM 106		2.	SMS blast <b>(One Time)</b> – Active Ordinary Members	RM 530		3.	SMS blast <b>(One Time)</b> – Ordinary and Students Members	RM 1,060		4.	Website banner advertising and facebook advert <b>(per month)</b>	RM 106		5.	Website Main Banner advertising and facebook advert <b>(per month)</b>	RM 212			<b>Total Fee</b> (Pls state if applicable)	<b>RM</b>	
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8.	<b>Person-in-charge of the Programme &amp; correspondence details:</b>  Name: _____ Position : _____  Contact Details : _____ Email : _____  Correspondence Address : _____																														
9.	<b>Fee is payable to:</b>  I enclose a company cheque made payable to <b>“Malaysian Financial Planning Council”</b> for <ol style="list-style-type: none"> <li>1. Programme Endorsement Fee <u>RM 212</u></li> <li>2. e-Marketing Services Fees <u>RM _____</u> (if applicable)</li> </ol>																														