

**GUIDELINES AND POLICIES ON  
PRINCIPLE CERTIFIED MFPC TRAINER AND  
CERTIFIED MFPC TRAINER  
(PRINCIPLE CMT AND CMT)**

**IMPORTANCE NOTICE:**

Principle Certified MFPC Trainer or Certified MFPC Trainer Applicants are advised to read and understand the contents of this Guideline before making the application. It is important to ensure that the Principle Certified MFPC Trainer or Certified MFPC Trainer Application Form submitted is complete so that due consideration can be given by MFPC in processing and approving submitted application. MFPC reserves the right to make any changes to this Guideline without any notice and without assigning any reasons whatsoever.

**For Principle Certified MFPC Trainer**

This document contains specific information regarding applications for promotion to Principle Certified MFPC Trainer and should be read in conjunction with the Guidelines and Policies on Certified MFPC Trainer (CMT)

Promotion to the grade of Principle Certified MFPC Trainer is available for those who have appointed for 3 years in MFPC with 10 sessions.

**CRITERIA FOR PROMOTION TO PRO-PRINCIPLE CERTIFIED MFPC TRAINER (CMT)**

Malaysian Financial Planning Council recognises the grade of Lecturer as the normal career grade and has taken the view that the case for promotion / regarding can only be based on achievements or quality beyond those required for the satisfactory performance of a lecturer's duties.

Principle CMT Candidates may apply for promotion on the basis of excellence in learning and teaching or impact and wider contribution to the MFPC and also feedback from students. Whatever is selected as the primary basis for the application, Principle CMT Candidates must also demonstrate their ability and effectiveness in one or both of the other areas.

Principle CMT Candidates should in their application demonstrate contributions across the breadth of the MFPC's strategic aims and provide evidence of contributions in all aspects.

**BENCHMARKS AND INDICATORS FOR PROMOTION**

The benchmarks and indicators is the key areas on which the CCB Panel seek evidence. The benchmarks are supported by the indicators that are designed neither to be exhaustive nor prescriptive, but are examples of the expected evidence to be outlined in an application - applicants are not expected to meet all the indicators in all areas.

Benchmarks and Indicators Are;

- Teaching and Learning
- Continuous Professional Development
- Wider Contribution to the MFPC and Community

It is acknowledged that some areas will be more appropriate to some disciplines than others, and it is expected that those applying for promotion will adapt their evidence to suit their particular discipline. Similarly, the CCB Panel will base their judgements accordingly.

**SELECTION CRITERIA**

An individual who is to be appointed as a trainer should meet the following criteria: -

1. Possess relevant tertiary education (Master or above) with RFP and/or Shariah RFP.
2. Has participated in at **least one “Train the Trainer Workshop”**.
3. Shall remain active member of the MFPC at all times and **fulfil the CPD hours** as required by the Certification and CPD Board.
4. Some lecturing experience with acceptable competence; preference of 2 years teaching experience.
5. Proven knowledge base of the subject(s) he/she teaches.
6. Ability to lecture and conduct tutorials for matured students.
7. Ability to assess students’ assignments, examinations, etc.
8. Ability to communicate effectively in English and/or Bahasa Malaysia and/or Mandarin, where such RFP programmes are conducted accordingly in that language.
9. The ability to relate to students from a variety of backgrounds.
10. Shall **not been adjudged a bankrupt**, not committed any acts of bankruptcy and no bankruptcy notice or bankruptcy petition filed within or outside Malaysia.

**CERTIFICATION CRITERIA**

The criteria for consideration as a Principle Certified MFPC Trainer or Certified MFPC Trainer include all or some of the following:

1. Has demonstrated experience and competence in conducting trainings
2. Has received favourable students’ evaluation feedback
3. Has strongly recommended by Education Provider(s) where certain forms of assessment have been performed
4. Should not be in a significant conflict-of-interest position in respect of MFPC and its courses, i.e. may proselytize students for other courses or may not speak well of MFPC because of his/her position
5. Module 7 Certified Lecturers are required to attend to at least one Module 7 Lecturers Familiarization Meeting after application is approved/shortlisted.

### **APPOINTMENT PROCEDURES**

Appointment of a Principle Certified MFPC Trainer or Certified MFPC Trainer to follow the policy and conditions set by MFPC and/or any educational guidelines set by the Ministry of Education or relevant governmental bodies;

1. Education Provider is responsible for the identification and selection of qualified trainers for a particular module. A list of potential trainers with complete curriculum vitae (CV) must be submitted to MFPC for approval.
2. CV shall be reviewed by the CCB Sub-Committee and short-listed candidates submitted for CCB's approval.
3. All approved trainers are to be reported to the NC.
4. MFPC Secretariat to issue the Certification letter to approve trainers and to communicate the MFPC requirements to them.
5. MFPC Secretariat to constantly update MFPC website on list of MFPC Certified Trainers.

### **RULES & DUTIES OF TRAINER**

The major rules and duties of a trainer are as follows: -

1. To adequately prepare and deliver the trainers for the Module(s) taught;
2. To conduct tutorials, practical classes, demonstration, workshops where needed;
3. To cover sufficiently the contents in the main course materials and to recommend additional supporting reading materials/reference materials;
4. Meeting the timetable for each class session as scheduled;
5. To ensure there are no inappropriate promotion of non-sectioned courses or products in class.
6. No recruiting of students for other purpose during the period of the engagement. This is especially in respect of proselytising of unit trust/insurance agents.

Other responsibilities will include the following: -

1. Participation in meetings and committees appropriate to area of specialization; and
2. Maintaining appropriate records and making available information as required timely.
3. Maintain professional conduct throughout the appointment.

### **PROCESSING FEE**

Fees payable by Pro-Principle CMT applicant is RM 75.00 for processing fee. This processing fee must be pay before submission of Pro-Principle CMT. Please kindly be informed that all the processing fee is **non-refundable**.

**DATA PROTECTION POLICY**

The MFPC Secretariat considers each application on its merits and may request additional information or documentation.

MFPC has implemented security policies and technical measures to protect Pro-Principle CMT Candidates' personal data in accordance with such requirements of the applicable personal data protection laws and regulations. Where MFPC consider it necessary or appropriate for the purpose of data storage or processing, MFPC may transfer the personal data to a third-party service or product providers within or outside Malaysia, under similar level of security measures.

**PRESENTATION SLIDES**

Pro-Principle CMT will be receiving presentation slides attach upon the invitation email. Lecturer is allowed to up-date the slides. The soft copy of the revised slides must be given to the MFPC Secretariat two week prior to the class.

**CPD PROGRAMME VOUCHER**

The MFPC grants every new Principle CMT with one complementary CPD Programme course to be taken in the MFPC within 1 years of the appointment.

**EVALUATION FOR PRINCIPLE CMT**

MFPC serve the right to appoint any CMT to attend and observe for any class conducted by Principle CMT for the learning and teaching purposes. During that time, Principle CMT needs to;

- 1) Allow any CMT assigned by MFPC to the class
- 2) Give a chance for CMT to conduct a short presentation (approximately 15-30minutes)
- 3) Evaluate the CMT during presentation for their learning and teaching improvements.

**CMT APPLICATION PROCEDURE****a) How to apply?**

Applicant who interested to become Principle Certified MFPC Trainer or Certified MFPC Trainer may submit their application form with other supporting documents. They may receive application form throughout this way:

- i. Walk-in to MFPC secretariat
- ii. Request to get application form by email the secretariat

Application forms must be completed in full and sent to the MFPC secretariat together with all required supporting documents. Please ensure you have enclosed all copies of relevant documents when submitting your application;

- i. Copy of IC/Passport
- ii. Copy of Postgraduates Certificate
- iii. Copy of latest Resume or CV
- iv. Passport Size Photograph
- v. Benchmarks and Indicators for Promotion (For Principle Certified MFPC Trainer Application)
  - a. Teaching and Learning
  - b. Continuous Professional Development
  - c. Wider Contribution to the MFPC and Community
- vi. Lecturer Skill (For Certified MFPC Trainer Application)
  - a. Teaching Material evidence (Choose one)
    - i. Live video of teaching (5 Minute Min. Duration)
    - ii. Presentation Slide
  - b. Research Material Evidence
    - i. Copy of Project Paper / Thesis
  - c. Training Skill Evidence
    - i. Copy of Train-The-Trainer programme certificate
- vii. Processing Fee payment receipt

Follow the steps below when applying for Principle Certified MFPC Trainer or Certified MFPC Trainer registration;

- i. Read the guideline manual before fill in the application form.
- ii. Ensure to understand the requirement to become Principle Certified MFPC Trainer or Certified MFPC Trainer
- iii. Complete the relevant sections of the application form.
- iv. Use the checklist in the application form to see if you have attached all the required documents.
- v. Submit the form together with supporting documents and proof of payment.

**b) Approval**

All the Principle Certified MFPC Trainer or Certified MFPC Trainer application form will be submitted to Technical Committee Meeting for deliberation. During Technical Committee Meeting the Principle Certified MFPC Trainer or Certified MFPC Trainer candidates will be present for interview session with Technical Committee. After that, the Principle Certified MFPC Trainer or Certified MFPC Trainer application form will be proposed to Certification and CPD Board (CCB) meeting. During meeting, the board will decide for approval of the application form. Generally, CCB Board meeting will be conducted in every quarter of year. Lastly, the CMT application form will be sent to National Council (NC) meeting for notification.

To ensure that application form is reviewed in a timely manner, it is essential that all required parts be submitted by the deadline.

**c) Acknowledgement Email**

Upon submission of the application, applicant may receive an acknowledgement email from the MFPC. The acknowledgement email could be in following matter:-

- i. To notify the applicant that their application form has been received by the MFPC and waiting for the decision by CCB Board in CCB Meeting.
- ii. To request for additional information necessary supporting documents.
- iii. To inform the result made up by CCB Technical Committee during CCB meeting

All the submission of form and supporting documents to MFPC shall not be returned to the candidates