

PITA INFO DECK

2025

A photograph of three business professionals in a modern office setting. A man in a dark suit is shaking hands with a woman in a dark blazer and light-colored shirt. Another man in a dark suit and glasses is standing to the right, looking towards the woman. The background is blurred, showing office buildings.

The Professionalism of Insurance and Takaful Agents (PITA) Programme



Introduction

*Malaysian Financial Planning Council (MFPC) is an independent professional body set up in 2004 with the **objective** of promoting nationwide development and enhancement of the financial planning profession in Malaysia*

The Big Idea

“All financial professionals should be equipped with financial planning knowledge given the trend towards increased convergence in the financial services industry.”

*YBhg. Tan Sri Dato' Sri Dr Zeti Akhtar Aziz
Former Governor of Bank Negara Malaysia (BNM)*





Recognized by:



BANK NEGARA MALAYSIA
CENTRAL BANK OF MALAYSIA



Suruhanjaya Sekuriti
Securities Commission
Malaysia



2 Professional Programmes Offered by MFPC



**Your Pathway
to Professionalism**

**Registered Financial Planner
(RFP)**



**A Premier Financial Planning
Designation of MFPC**

**Shariah Registered Financial Planner
(Shariah RFP)**

RFP Modules



**Your Pathway
to Professionalism**

Module 1

Fundamentals of Financial Planning

Module 2

Risk Management and Insurance Planning

Module 3

Investment Planning

Module 4

Zakat and Tax Planning

Module 5

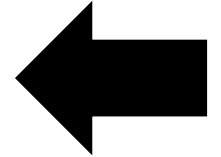
Estate Planning

Module 6

Retirement Planning

Module 7

Applications in Financial Planning



PITA
compliance
module

Shariah RFP Modules



**A Premier Financial Planning
Designation of MFPC**

Module 1

Fundamentals of Shariah Financial Planning

Module 2

Risk Management and Takaful Planning

Module 3

Shariah Investment Planning

Module 4

Zakat and Tax Planning

Module 5

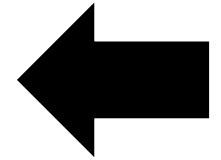
Shariah Estate Planning

Module 6

Retirement Planning

Module 7

Applications in Shariah Financial Planning



PITA
compliance
module

Professional Titles for RFP / Shariah RFP Modular Certification Programmes



CONVENTIONAL RFP	
Module	Professional Certification Title
Module 2: Risk Management and Insurance Planning	Professional Insurance Adviser (PIA)
Module 3: Investment Planning	Professional Investment Planning Adviser (PIPA)
Module 4: Zakat and Tax Planning	Professional Tax Planning Adviser (PTPA)
Module 5: Estate Planning	Professional Estate Planning Adviser (PEPA)
Module 6: Retirement Planning	Professional Retirement Planning Adviser (PRPA)

SHARIAH RFP	
Module	Professional Certification Title
Module 2: Risk Management and Takaful Planning	Professional Takaful Adviser (PTA)
Module 3: Shariah Investment Planning	Professional Shariah Investment Planning Adviser (PSIPA)
Module 4: Zakat and Tax Planning	Professional Zakat and Tax Planning Adviser (PZTPA)
Module 5: Shariah Estate Planning	Professional Shariah Estate Planning Adviser (PSEPA)
Module 6: Retirement Planning	Professional Shariah Retirement Planning Adviser (PSRPA)


Please note that:


1. Professional titles are only given upon passing Module 1 **AND** any one module from Module 2 to Module 6
2. Professional titles are given to Module 2 to Module 6 only
3. No professional titles are given to Module 1 (fundamental and non-specialized paper) and Module 7 (practical and non-specialized paper)
4. Must be active members of MFPC

PITA EXAMINATION FACILITATORS (PEFs)

PEF	Type of PITA Exam Conducted
 <p>Aii</p>	<p>1. PITA RFP CM2 (for single-license insurance agents) 2. PITA RFP DM2 (for dual-license agents who serve the insurance and takaful sectors)</p> <p>Registration: https://www.mii4u.org/ilms/user/login For assistance: Ms Samsina 03-27128882 email: agentexam@aiaasia.org</p>
 <p>MTA</p>	<p>1. PITA Shariah RFP M2 (for single-license takaful agents)</p> <p>Registration link: https://www.takafuleexam.com/introduction/index For assistance: M2 Admin 03-22766786 email: m2admin@malaysiantakaful.com.my</p>

PITA Learning Materials



Exam Code	Module Title	Language	
		E-Book	Video
PCM2	Risk Management and Insurance Planning	English Mandarin	English Mandarin
PDM2	Risk Management and Insurance Planning	English Mandarin	English Mandarin
	 Risk Management and Takaful Planning	English Bahasa Malaysia	English Bahasa Malaysia
PITA Shariah RFP M2	Risk Management and Takaful Planning	English Bahasa Malaysia	English Bahasa Malaysia

PITA Examination Format

Remarks:

1. ***the result slip serves as an official proof of 30 CPD attainment***
2. ***Passing for all exams = 50%***

Exam Code	Format	Mode	Language	Note
PCM2	75 MCQs (2 hours)	Virtual Computer- Based (VCB)	English Mandarin	Exam frequency: refer to Aii's website
PDM2	100 MCQs (2½ hours)		English	Exam frequency: refer to Aii's website To pass overall: Session A: 50 RFP CM2 MCQs, at least 25 questions must be answered correctly Session B: 50 Shariah RFP M2 MCQs, at least 25 questions must be answered correctly
PITA Shariah RFP M2	75 MCQs (2 hours)		English Bahasa Malaysia	Exam frequency: refer to MTA's website There is a flexibility to switch between English and BM at any point during the exam Ad hoc examination can be arranged by ITOs for bulk registration

MFPC Industry Campaign for PITA 2025

- **Unlimited Free Resits** for Insurance and Takaful agents who registered PITA examination effective 09 January 2025
- Important to take note Free Resits shall be utilized by 31 December 2025

MFPC Industry Campaign for PITA 2025

Objectives of the campaign

1. To create awareness and reach a wider audience to fulfil BNM's regulatory requirement by 31 Dec 2025
2. To motivate agents to take the first bold step immediately
3. To reduce anxiety; high stakes testing may create significant anxiety; allowing resit can alleviate some of this pressure; enabling agents to perform better when they have a second chance
4. To promote equity and access; not all the agents have the same resources and support systems. Some may face personal challenges such as health issues, family responsibilities; lack technical or IT support. Resit helps level the playing field
5. To encourage continuous learning; allowing a growth mindset when agents view mistakes as learning opportunities rather than failures
6. To improve learning outcomes; improve retention of knowledge, and better preparedness for future courses
7. To support diverse learning styles; acknowledge some agents may need additional time to grasp complex concepts, need more time to demonstrate mastery of the subject matter

PITA Examination Fees

2025 ONLY

**Unlimited
FREE
resits**

Exam

Fee (RM)

Exam	Fee (RM)			
	NEW		RESIT	
	Individual Registration	Bulk Registration (via ITO)	Individual Registration	Bulk Registration (via ITO) minimum pax = 50
PITA RFP CM2	200	200	100	0
PITA RFP DM2	280	280	140	0
PITA Shariah RFP M2	200	200	100	0

PITA EXAMINATION BOOTCAMP

Session	Date	Time	Language
1	15 March 2025 (Saturday)	10am to 1pm	RFP M2: English & Mandarin (combined) Shariah RFP M2: English & BM (combined)
2	14 June 2025 (Saturday)	10am to 1pm	RFP M2: English & Mandarin (combined) Shariah RFP M2: English & BM (combined)
3	13 September 2025 (Saturday)	10am to 1pm	RFP M2: English & Mandarin (combined) Shariah RFP M2: English & BM (combined)
4	13 December 2025 (Saturday)	10am to 1pm	RFP M2: English & Mandarin (combined) Shariah RFP M2: English & BM (combined)



Tingkatkan Masa Depan Kewangan Anda dengan **PITA**

Daftar sekarang:

Labur dan Kembangkan Kerjaya Anda!



Thank You

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