



ISLAMIC Financial Planner



A PROFESSIONAL QUALIFICATION BY:



TRAINING PROVIDED BY:



RECOGNISED BY:



BANK NEGARA MALAYSIA
CENTRAL BANK OF MALAYSIA



IFP CALENDAR (Jan / Mar / May / Jul / Sep / Dec)
CHALLENGE STATUS/6 DAYS
Lectures: 4 days/ Assessment: 2 days (Fees: RM2,600.00)

- Penang
- UUM Kuala Lumpur
- UUM Sintok, Kedah

ACCREDITED BY:



Full Accreditation

LEARNING MODE



Face to face

ABOUT THE PROGRAMME

The Islamic Financial Planner™ (IFP®) is a professional qualification programme designed especially for professionals and executives serving the retail segment of the Islamic financial market. IFP® is pre-requisite for Capital Market Services Representative's License (CMSRL) by Securities Commission (SC) and Financial Advisers' Representative License (FAR) by Bank Negara Malaysia (BNM) to carry out the regulated activity of financial planning. This programme is a joint collaboration between IBFIM and Financial Planning Association of Malaysia (FPAM), and receives Full Accreditation from Finance Accreditation Agency (FAA).

LEARNING OUTCOMES

Upon completion of this advanced level, participants would attain a comprehensive knowledge and have standard proficiency as Islamic finance professional. Their professionalism can be measured through their ability to:

- Guide clients through comprehensive financial planning process
- Advise clients on how they may achieve their financial goals according to Shariah and subsequently for *Al-Falah*
- Implement and monitor holistic financial plan for the client

TRAINER PROFILE



Name: Dr. Alias bin Mat Nor
Academic background : DBA ITM, BBA UTM, MBA UUM
PhD in Islamic Finance & Banking UUM
Professional certs: MI General, IJIA
Experience: 25 years ++ in banking industry (Islamic and conventional)



Name: Dr. Norazah bt Che Arshad
Academic background : Sarjana muda Ekonomi, Universiti Utara Malaysia
MA, Ekonomi, UKM
PhD in Islamic Finance (Risk Management), UM
Professional certs: IFP
Experience: IFP Facilitator IFP since 2017



Name: Dr. Ahmad Khilmy b Abdul Rahim
Academic Background : Bachelor of IRSH (Fah dan Usul Fiqh), UUM, 1999
Master of Syariah (Fah dan Usul Fiqh), UUM, 2005
PhD in Islamic Finance and Banking, UUM, 2013
Professional certs: Islamic Financial Planner (IFP), Certified Qualification in Islamic Finance (CQIF)
Experience: IFP Facilitator since 2014



Name: Dr. Noraini Yusoff
Academic Background:
Bachelor of Islamic Finance and Banking UUM
Master Business Administration (Finance) - UUM
PhD in Islamic Finance - UM
Professional certs: Islamic Financial Planner (IFP)
Experience: IFP Facilitator since 2018



Name: Dr. Mohd Shahril bin Ahmad Razali
Academic Background : Bachelor of Islamic Studies, Syariah and Qadiri UUM / IV King Fahd bin Abdul Aziz
Master in Management GSM UUM
PhD in Islamic Management Adu/ UUM
Professional certs: Islamic Financial Planner (IFP), Certified Qualification in Islamic Finance (CQIF)
Experience: IFP Facilitator since 2014, IRCA Lead Auditor 2015, Syariah Technical Expert SRIM



Name: Dr. Mohamad Yazid Isa
Academic background :
Bachelor of Syariah UUM
Master Business Administration UUM
PhD in Islamic Finance - INCEIF
Professional certs: Islamic Financial Planner (IFP)
Experience: IFP Facilitator since 2013



Name: Dr. Amrul Fadz bin Osman
Academic background : Bachelor of Syariah UUM, Chartered Islamic Finance Professional (CQIF), INCEIF
PhD in Islamic Finance - IBF, UUM
Professional certs: Islamic Financial Planner (IFP)
Experience: IFP Facilitator since 2016



Name: Dr. Annuil Haseem bin Abd Ghani
Academic background:
Dip. Banking UUM
BA(Hons) Islamic Banking UUM
MSc Islamic Accounting Qadiriya University
PhD Islamic Finance & Economic Durban University
Professional certs : IFP, CQIF
Experience : IFP Facilitator since 2018



Name: Dr. Mohd Sallehuddin Shaib
Academic background : Bachelor Syariah (Syariah Economics) UUM
PhD in Syariah (Islamic Finance)
Professional certs: Islamic Financial Planner (IFP)
Experience: IFP Facilitator since 2017



Name: Muhamad Abrar bin Bahaman
Academic background :
Bachelor of Islamic Finance and Banking (IBF) - UUM2
Master Islamic Finance - INCEIF
PhD in Islamic Finance and Banking (in progress)
Professional certs: Islamic Financial Planner (IFP)
Experience: IFP Facilitator since 2013



Name: Dr. Sa Shabruil Nizam b Ahmad
Academic background : Sarjana Muda Insurans, UUM
Academic background : University of New South Wales, Australia
MA Pengurusan Risiko, University of New South Wales, Australia
Sedang menyiapkan tesis PhD Pengurusan Risiko
Professional certs : IFP dan MI
Experience : Director of Risk Management Unit, UUM since 2016
IFP Facilitator since 2017

ENTRY REQUIREMENT for Challenge Status

- Certified Financial Planner® (CFP®) holders; or
- Other professional certificates e.g. Chartered Financial Analyst® (CFA®), Chartered Accountant (CA) or equivalent with 3 years' experience; or
- Bachelor degree holders in any discipline with 5 years of minimum experience in financial services industry.
- Without Diploma or Degree – must apply RPL prior to register the program.

(Contact No: 03-20311010 ext 584/539 or Email: aida@ibfim.com / arafah@ibfim.com)

FREQUENTLY ASKED QUESTION (FAQ)

1. WHAT IS THE ISLAMIC FINANCIAL PLANNER™ (IFP®) PROGRAMME?

The Islamic Financial Planner™ (IFP®) is a professional Qualification programme designed especially for professionals and executives serving the retail segment of the Islamic financial market. (IFP® is pre-requisite for Capital Market Services Representative's License (CMSRL) by Securities Commission (SC) and Financial Advisers' Representative License (FAR) by Bank Negara Malaysia (BNM) to carry out the regulated activity of financial planning.) This programme is a joint collaboration between IBFIM and Financial Planning Association of Malaysia (FPAM), and receives Full Accreditation from Finance Accreditation Agency (FAA).

2. WHAT AREAS OF KNOWLEDGE DOES THE IFP® PROGRAMME COVER?

The IFP® programme covers the major components of financial planning with the Islamic aspects being comprehensively integrated into each of the modules.

3. WHAT ARE THE IFP® MODULES?

Module 1 - Shariah & Major Components of Islamic Financial Planning

Module 2 - Islamic Risk Management, Estate & Waqf Planning

Module 3 - Islamic Investment, Retirement, Zakat & Tax Planning

Module 4 - Islamic Financial Plan Construction & Professional Responsibilities

4. WHAT IS THE IFP® CHALLENGE STATUS PROGRAMME?

Candidates having the following qualifications and/or professional credentials are eligible to apply for the IFP Challenge status.

- Certified Financial Planner® (CFP®) holders; or
- Other professional certificates e.g. Chartered Financial Analyst® (CFA®), Chartered Accountant (CA) or equivalent with 3 years' experience; or
- Bachelor's degree holder in any discipline with 5 years minimum experience in Islamic financial services industry

5. HOW LONG IS THE TRAINING?

Challenge Status 4 + 2 days (Lectures – 4 days & Assessment – 2 days)

6. WHY SHOULD UNIT TRUST CONSULTANTS, TAKAFUL AGENTS AND ISLAMIC BANKERS BE IFP® HOLDERS?

Being certified as an Islamic Financial Planner™ will equip them with all the necessary knowledge to serve clients better and to become a financial advisory professional. The IFP® programme sets the competency standards and ethical practices of the professionals. In short, the consultants and agents can look forward to a fulfilling and prosperous career of being an Islamic financial planner.

7. WHAT ARE THE EXEMPTIONS GRANTED BY THE INDUSTRY FOR IFP® HOLDERS?

IFP® graduates are exempted from the Pre-Contract Examination for Takaful Basic Examination (TBE) by Malaysian Takaful Association (MTA) and Insurance Agents (PCEIA) Part A, B & C by Malaysian Insurance Institute (MII).

8. IS THE IFP® PROGRAMME RECOGNISED BY SECURITIES COMMISSIONS AND BANK NEGARA MALAYSIA?

IFP® is recognized by the SC for Capital Market Services Representative's License (CMSRL) for financial planning and by BNM for Financial Adviser's Representative license (FAR).

PROGRAMME OFFERED IN ISLAMIC BUSINESS SCHOOL

BACHELOR OF ISLAMIC
FINANCE AND BANKING
(BIFB)

BACHELOR OF MUAMALAT
ADMINISTRATION
(BMA)

MASTER OF ISLAMIC BUSINESS
STUDIES
(MIBS)

MASTER IN ISLAMIC
FINANCE AND BANKING
(MIFB)

PhD

1. Shariah Advisory and Muamalat
2. Islamic Management,
3. Islamic Banking and Finance 4.
Islamic Economics.

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