



Training Programme No: TBA

MII Training

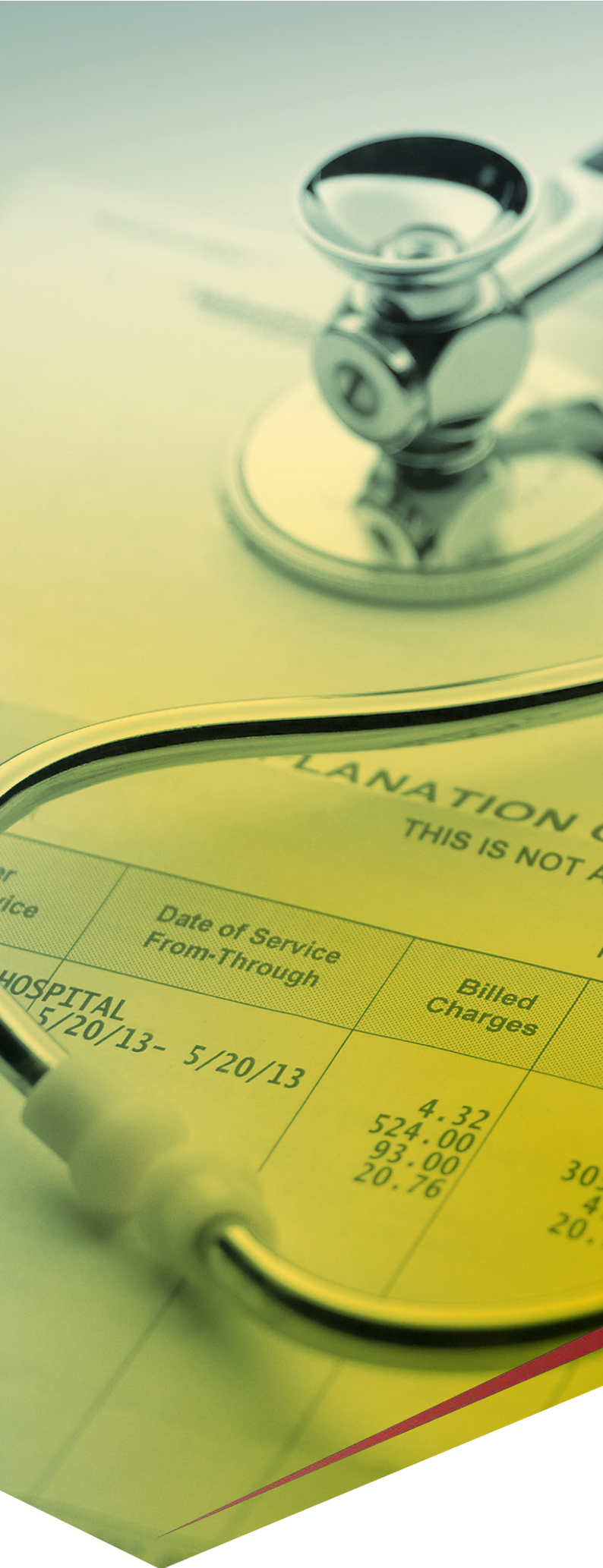
# Foundation in Life Underwriting



19 & 20 June 2024



In-Person Training



## OVERVIEW

In this course, we'll discuss the concept of Life Underwriting and the roles, responsibilities, and steps involved in the underwriting process. We'll also discuss how to apply what you've learned into practice.

## TARGET AUDIENCE

- Employees with less than 2 years insurance experience

# LEARNING OUTCOMES

At the end of the programme, participants should be able to:

- Understand the concept of Life Underwriting.
- Understand aims of the underwriter, short term and long term.
- Understand the factors involved in Risks selection.
- Identify type or source of documents to shape the final underwriting decision.
- Identify what's sub-standard/standard or medical and non-medical cases.
- Understand on process flow, from date of accepting proposal form until date of final decision making.
- Application of theories and concepts learned into practices based on case scenarios.

## COURSE CONTENT

### DAY 1

- Introduction to Basic Life Underwriting
- Who is the underwriting personnel?
- What is their authority and approaches?
- The Principle of Risks Selection
- The Tools of Underwriting

### DAY 2

- The Classification of Underwriting
- The Underwriting Process
- Case Study 1
- Case Study 2

# TRAINER PROFILE



## ELWIN LAU

B.Sc (Hons) (UK), MFP(Aust), ANZIIF(Senior Assoc), ChFC, CFP, RFP and Shariah RFP

Elwin has been actively involved in insurance industry for more than twenty five years. He has held various positions as Manager of Underwriting, Branch Head and Head of Operations and Customers Service. He has a Bachelor of Science (Honours) and possesses a Master in Financial Planning. He is also a Senior Associate of The Australian Insurance Institute and New Zealand Institute of Insurance and Finance (ANZIIF).

He currently provides financial planning consultancy to both individual and business owners in the financial services industry. He serves as Treasurer of the Malaysia Financial Planners & Advisers Association.

He also conducts regular training in technical insurance with Malaysian Insurance Institute and various institutions in financial planning for professional examination. He is a certified trainer to Malaysian Insurance Institute, RFP program in addition to CFP program.

Elwin is a Chartered Financial Consultant (ChFC), a Certified Financial Planner (CFP), Registered Financial Planner (RFP) and Shariah Registered Financial Planner (Shariah RFP).

# PROGRAMME DETAILS



**19 & 20 June 2024**

**9.00 a.m. – 5.00 p.m.**

Registration Closing Date: 13 June 2024

**MII Member**

**Non Member**

**Early Bird**  
(Register before  
5 June 2024)

**Single**  
RM 980 / USD230

**Single**  
RM 1080 / USD250

**Normal Fee**

**Single**  
RM 1080 / USD250

**Single**  
RM 1,180 / USD272

**Group**  
RM 930 / USD218

**Group**  
RM 1030 / USD240



# HRD Claim Application



Malaysian Insurance Institute (MII) courses have been granted the status of Approved Training Programme (ATP) under the Human Resources Development Act 1992. Based on Training Providers Circular No. 3/2021, PSMB has imposed a requirement that training providers need to register their training programme under the HRD Corp Claimable Course Scheme to offer training to the employers who are registered under the Human Resource Development Corporation (HRD Corp).

## 1. What is HRD Corp Claimable Courses?

HRD Corp Claimable Courses formerly known as SBL Khas is a scheme to assist registered employers, especially those with limited resources to train and upskill their employees in line with their operational and business requirements. Under this scheme, HRD Corp will pay the course fee (subjected to 4% service fee from 1<sup>st</sup> April 2021) directly to the training providers by deducting the amount from the employers' levy account. HRD Corp will also pay other claimable allowances to the employer.

## 2. How are Training Providers or Employers to submit for HRD Corp Claimable Courses?

Malaysian Insurance Institute (MII) will submit their Courses registration via the HRDC e-Tris system. Once course is approved as Claimable Course (previously known as SBL Khas course), the approved course will appear in the HRDC e-Tris system.

Employers will need to access the e-Tris system to select the course and submit to HRDC for grant approval. The total claimable amount is subject to the approval of each Employer individual grant application, Once HRDC approves Employer grant, the company must provide the approved grant code to Malaysian Insurance Institute (MII).

After the training is conducted, Employers are required to complete HRDC Attendance Reports eg. JD14 and submit necessary documents to ensure HRDC settlement of Malaysian Insurance Institute (MII) invoice.

Malaysian Insurance Institute (MII) will submit the invoice directly to HRDC with the approved grant code for each participant or Employer.

## 3. How to submit the grant application?

Please click on link for information on training grants application:  
<https://hrdcorp.gov.my/employer-guidelines/>

## 4. What are the supporting documents required?

Please click on link for information on training grants application:  
<https://hrdcorp.gov.my/skim-bantuan-latihan-khas-sbl-khas-2/>

### Important Notice

- Effective **1<sup>st</sup> August 2019**, training programmes must commence within **six (6) months** from the date of training grant applications are made and training claim submissions must be made **not more than six (6) months** from the date the training programmes are completed.
- Application must be submitted by employers before training date commencement
- Please click on the following link for more information on training claims application - <https://hrdcorp.gov.my/employer-guidelines/>

For more information and updates on HRDC, please refer to its official webpage at [www.hrdcorp.gov.my](http://www.hrdcorp.gov.my). Should you have any problem in accessing your e-Tris account, kindly forward the issue to HRDC IT Help Desk at [ithelpdesk@hrdcorp.gov.my](mailto:ithelpdesk@hrdcorp.gov.my)

## Application Process

### 01 Application via e-Tris

Documents Required:

- ✓ Quotation / Invoice
- ✓ Training Schedule / Course Content
- ✓ Trainer Profile

### 02 Approval

Documents Required:

- ✓ To share Grant ID to Training Provider

### 03 Claim

Documents Required:

- ✓ Itinerary (airfare) - if any
- ✓ Receipt & Invoice (transportation) - if any





## Malaysian Insurance Institute

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For further information, please contact:  
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