

Preparatory Class for REGISTERED FINANCIAL PLANNER (RFP) MODULE 2 / SHARIAH MODULE 2

Your Pathway to Professionalism

14

CPD
HOURS



Asian
Institute of
Insurance



OBJECTIVE



Cultivate professionalism among the insurance/takaful agents



Enhance insurance/takaful planning services and advisory practices to the public



Equip insurance/takaful agents with RFP/SRFP professional qualification

STUDY & EXAM MODE

- **Class Based**
- **Modes of Exam:**
 - » **Computer-Based-Exam (CBE)** - Click [here](#) to check our examination centre locations
 - » **Virtual Computer-Based Exam (VCBE)** - Take your exam anytime and anywhere. Click [here](#) for more details
- **Exam registration via Aii** – Click [here](#) to register

PROGRAMME FEE

- **RM 400 per module** (excluding exam fee)
- **Register Now**



<https://aii4u.org/ilms/user/login>



LEARNING OUTCOMES

- Understand the impact of insurance/takaful in financial planning
- Evaluate risks with appropriate techniques and tools
- Differentiate types of insurance/takaful products in the market
- Recommend suitable insurance/takaful products and services to clients



ADDED VALUES

- Embrace professionalism in insurance/takaful industry
- Meet experienced and certified trainers
- Establish networking with agents nationwide



MODULES

- **PITA RFP Module 2**
Risk Management and Insurance Planning
Quarter 1
4, 6, 11 & 13 March 2024
(1/2 day session, 9.00 a.m - 1.00 p.m.)
Quarter 3
15, 17, 22 & 24 July 2024
(1/2 day session, 9.00 a.m - 1.00 p.m.)
- **PITA RFP Module 2 Shariah**
Risk Management and Takaful Planning
Quarter 1
5, 7, 12, & 14 March 2024
(1/2 day session, 9.00 a.m - 1.00 p.m.)
Quarter 3
16, 18, 23 & 25 July 2024
(1/2 day session, 9.00 a.m - 1.00 p.m.)

DURATION	CLASS SIZE	MEDIUM OF INSTRUCTION	EXAM RESULT
2 days each module	Minimum 30 pax for each class	English	Result can be downloaded from ILMS.

FEES	REGISTRATION	VENUE
RM 400 per module (excluding exam fee)	https://aii4u.org/ilms/user/login	Aii Training Room, Level 2, Bangunan AICB, No. 10 Jalan Dato' Onn, 50480 Kuala Lumpur, Malaysia

COURSE OUTLINE

<p>Module 2: Risk Management and Insurance Planning</p> <ol style="list-style-type: none"> 1. Understanding Risks 2. Risk Management 3. Insurance Needs Analysis 4. Life Insurance Policies 5. Health insurance Policy 6. Annuities 7. General Insurance Products in Insurance Planning 8. Takaful 9. Legal Principles and relevant legislation in insurance 10. Consumer Protection and Life Insurance Industry Code of Practice 11. SOCSO 	<p>Module 2: Risk Management and Takaful Planning</p> <ol style="list-style-type: none"> 1. Risk Management 2. Risk Management in Islamic Point of View 3. Risk and Insurance 4. Takaful: The Shariah Compliant Issues 5. Takaful: A Comparison with Insurance 6. Family Takaful 7. General Takaful 8. Investment Linked Takaful 9. Takaful Agent: Ethics, codes of conduct 10. Claims: Family and General Takaful 11. The Importance of Takaful in Shariah Financial Planning and Cases
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Contact us
sales@aiaasia.org
+603 2712 8882