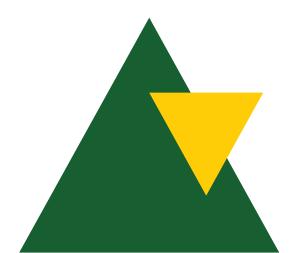




REGISTERED FINANCIAL PLANNER (RFP) MODULE 2 / SHARIAH MODULE 2

PROFESSIONAL CERTIFICATION





LEARNING PATHWAY

- · Cultivate professionalism among insurance / takaful agents.
- Enhance insurance / takaful planning services and advisory practices to the public.
- Equip insurance/takaful agents with RFP / SFRP professional certification.

LEARNING OUTCOME

- · 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.

COURSE OUTLINE

Module 2: Risk Management and Insurance Planning

- 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.

Module 2: Risk Management and Takaful Planning

- 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.



IMPORTANT DATES

Modules	l⁵t Half	2 nd Half
PITA RFP Module 2 : Risk Management and Insurance Planning	4, 6, 11 & 13 March 2024	15, 17, 22 & 24 July 2024
PITA RFP Module 2 Shariah : Risk Management and Takaful Planning	5, 7, 12, & 14 March 2024	16, 18, 23 & 25 July 2024

- 1. The modules will be conducted over four days for 1/2 a day each.
- 2. Minimum of 30 pax per class.
- 3. Language: English.
- 4. Exam result: Results will be released on the iLMS.
- 5. Venue:

Aii Training Room, Level 2, Bangunan AICB, No. 10, Jalan Dato' Onn, 50480, Kuala Lumpur, Malaysia

STUDY & EXAM NOTES

- · Class-based.
- · Modes of Exam:
 - · Computer-Based Exam (CBE).
 - · Virtual Computer-Based Exam (VCBE).
- · Exam Registration via Aii.

REGISTRATION

- · RM 400 per module (excludes exam fee).
- · Exam Fee: RM 200.
- Register through: https://www.mii4u.org/ilms/user/login

Asian Insurance of Institute

(Formaly known as Malaysia Insurance Institute)

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For further information, please contact: Email: sales@aiiasia.org