



# 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  | 1 <sup>st</sup> Half      | 2 <sup>nd</sup> Half      |
|--|---------------------------|---------------------------|
| PITA RFP Module 2 :<br>Risk Management and<br>Insurance Planning       | 4, 6, 11 & 13 March 2024  | 15, 17, 22 & 24 July 2024 |
| PITA RFP Module 2 Shariah :<br>Risk Management and Takaful<br>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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