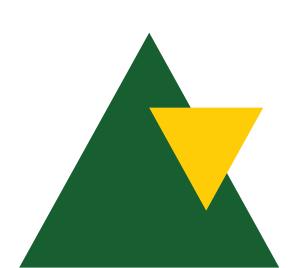# REGISTERED FINANCIAL PLANNER (RFP) MODULE 2 / SHARIAH MODULE 2

TRAIN THE TRAINER

PROFESSIONAL CERTIFICATION

LEARNING PATHWAY

- To provide trainers the fundamentals of facilitating a class and ensuring professionalism in the delivery of the subject.
- To provide a better understanding and effective delivery of the subject.
- To provide an overview and effective use of the standardised presentation slides provided.

CERTIFICATION

Certification as certified PITA RFP M2 TTT / PITA RFP M2 Shariah TTT for the specific module will be given by MFPC upon satisfactory completion of the course (80% attendance) and passing the RFP examination.

This programme is only open for In-house Companies Trainer. After completing this program, participants will be exclusively authorised to provide training services within their current company.

COURSE OUTINE

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.

AREAS COVERED

- Refresher on the Fundamental of Training
- Overview of the RFP Module Contents
- Overview of the RFP Module Presentation Slides

IMPORTANT DATES

Modules	February	July
RFP Module 2 : Risk Management and Insurance Planning (10001340517)	24 - 25 February 2025 (Registration closed: 17 February 2025)	28 - 29 July 2025 (Registration closed: 21 July 2025)
RFP Module 2 Shariah : Risk Management and Takaful Planning (10001349268)	26 - 27 February 2025 (Registration closed: 19 February 2025)	30 - 31 July 2025 (Registration closed: 23 July 2025)

SELECTION CRITERIA

- Has undergone the RFP Module 2 Course.
- Posses relevant tertiary education or recognised professional qualification.
- Teaching experience with acceptable teaching competency.
- Proven knowledge base of the subject(s).

- Ability to lecture, conduct tutorials, assess students' assignments, examination, etc.
- Ability to communicate effectively in English, Bahasa Malaysia, or Mandarin where such RFP programmes are conducted in the respective languages.
- Ability to relate to students from a variety of backgrounds.

REGISTRATION

- RM 1,500 per module (excludes exam fee).
- Exam Fee: RM 200.
- Register through : https://www.mii4u.org/ilms/user/login

HRD Claim Application

Asian Institute of Insurance (Aii) 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 1st 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?
Asian Institute of Insurance (Aii) 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 Asian Institute of Insurance (Aii).

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

Asian Institute of Insurance (Aii) 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 **1ˢᵗ 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

For more information and updates on HRDC, please refer to its official webpage at 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**

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

01 — Claim

Documents Required:
- Itinerary (airfare) - if any
- Receipt & Invoice (transportation) - if any