



A PROFESSIONAL DESIGNATION FOR AGENCY LEADERS

Chartered Agency Builder

INTRODUCTION BROCHURE • FOR AGENCY USE



Brought to you by
Asian Institute of Insurance (Aii)
in strategic partnership with
Life Insurance Association Malaysia (LIAM)



What it means for you as a leader

CAB recognises you as a leader — the person who builds people, culture and capability, and sets the standard your agency lives by. It marks disciplined leadership development, ethical accountability and continuing competence.



01 Professional standing

An industry-recognised mark of agency leadership, conferred on proven leaders — never awarded on production alone.

02 A stronger agency

Sharper strategy, disciplined recruitment and selection, better coaching and supervision, and clearer performance accountability.

03 Lasting trust

An ethical, customer-centric culture and a sustainable leadership pipeline that keeps your agency growing.



Milestone to CAB

CAB is built on three pillars — advanced leadership mastery, practical agency management and annual CPD. Every agency leader completes Pillar 1 and 2 to earn the designation, then Pillar 3 each year to maintain it.

PILLARS

1

PAMP · 4 days · 28 CPD

Professional Agency Management Programme

Strategy, leadership, productivity, coaching and business planning.

2

AMTC · 23 weeks · 69 CPD

Agency Management Training Course

Agency building, recruitment, selection, training and performance management.

3

CAB-CPD · 20 HOURS PER ANNUM

ANNUAL CAB-CPD MAINTENANCE

- 20 CAB-CPD hours per annum
- Aii programmes only
- Active affiliate membership
- Annual declaration and renewal
- Good standing maintained



PILLAR 1

PAMP

PROFESSIONAL AGENCY MANAGEMENT PROGRAMME

PROGRAMME OVERVIEW

The Professional Agency Management Programme equips agency leaders with the essential leadership, strategic and management capabilities to lead high-performing teams in the life insurance industry. Participants gain practical insight to develop visionary leadership, enhance advisor productivity and drive sustainable business growth.

LEARNING OUTCOMES

- ▶ Develop and execute strategic plans aligned with organisational goals
- ▶ Lead with vision to inspire high-performance teams
- ▶ Set and manage SMART goals with accountability
- ▶ Improve advisor productivity and engagement through MAPA strategies
- ▶ Apply effective recruitment, coaching, and training techniques
- ▶ Build sustainable business growth through structured planning and leadership practices

COURSE CONTENT

PROFESSIONAL AGENCY MANAGEMENT PROGRAMME

1

DAY 1

Strategic Foundation & Vision

- Strategic Thinking (market trends, regulatory environment, SWOT)
- Vision Casting and leadership role alignment
- Business Planning fundamentals and goal setting
- SMART goals and team alignment

2

DAY 2

Driving Performance & Productivity

- Managing MAPA (advisor engagement & productivity)
- Monitoring performance and KPI tracking
- Advisor segmentation and prioritisation
- Retention and referral strategies

3

DAY 3

Talent Management & Development

- Recruitment & Selection strategies
- Digital recruitment trends and candidate profiling
- Training & development frameworks
- Advisor development plans and performance monitoring

4

DAY 4

Coaching & Leadership Excellence

- Coaching vs mentoring and coaching frameworks
- Sales coaching and high-performance culture
- Leadership development and self-assessment
- Strength management, communication, and professional priorities

PILLAR 2

AMTC

AGENCY MANAGEMENT TRAINING COURSE

PROGRAMME OVERVIEW

The Agency Management Training Course (AMTC) by LIMRA is a comprehensive leadership development programme designed to equip sales managers, agency leaders and functional managers with essential management and agency-building skills. It focuses on planning, recruitment, performance management and agent development, delivering measurable improvements in productivity, retention and business growth.



LEARNING OUTCOMES

- Develop and implement effective agency plans and strategies
- Conduct performance reviews and manage agent productivity
- Apply structured recruitment and selection techniques to reduce turnover
- Design impactful training programmes for behavioural and performance improvements
- Strengthen supervisory and leadership capabilities to drive business results
- Improve key management competencies such as planning, recruitment, and activity analysis

COURSE CONTENT

AGENCY MANAGEMENT TRAINING COURSE

1

Module 1 - Planning

- Develop agency mission, culture, and strategic direction
 - Build annual business plans
 - Conduct performance reviews and future planning for agents
-

2

Module 2 - Recruiting

- Identify high-potential candidates
 - Utilise referrals, warm leads, and networking
 - Explore modern and alternative recruitment strategies
-

3

Module 3 - Selection

- Apply structured selection methodologies
 - Reduce turnover through effective screening
 - Implement job-sampling programmes for candidates
-

4

Module 4 - Training

- Design and deliver impactful training programmes
 - Apply behavioural change techniques
 - Use agency activities and events for skill development
-

5

Module 5 – Performance Management

- Enhance supervisory and coaching capabilities
- Monitor agent activities and productivity
- Develop tailored performance improvement plans

PILLAR 3

CAB-CPD

ANNUAL CAB-CPD REQUIREMENT

OVERVIEW

To maintain the designation, every CAB holder must complete a minimum of 20 CAB-CPD hours annually through Aii programmes only, aligned to The Best Practices Guide published by LIAM. Aii's central training record is authoritative and external hours are not recognised. Renewal is assessed on the preceding calendar year's records.



FIVE KEY COMPONENTS

- Ethics, Governance and Customer Trust
- Customer-Centric Advisory and Quality Outcomes
- Agency Leadership, Coaching and Supervision
- Ethical Recruitment and Talent Sustainability
- Reflective Professional Development

LEARNING CONTENT

CAB-CPD — INDICATIVE FOCUS AREAS

1

Ethics, Governance and Customer Trust

- Ethics and governance refresher, customer best interest, fair dealing, complaints handling, fraud case studies
 - Outcome: sustained ethical judgement and proper use of the designation
-

2

Customer-Centric Advisory and Quality Outcomes

- Needs-based advisory management, fact-find quality oversight, suitability and disclosure, policy review
 - Outcome: stronger supervision of advisory quality
-

3

Agency Leadership, Coaching and Supervision

- Coaching for managers, joint field work, activity management, new agent case review and sign-off
 - Outcome: a data-enabled agency development system
-

4

Ethical Recruitment and Talent Sustainability

- Ethical recruitment and selection, fair competition, onboarding, talent pipeline and retention
 - Outcome: ethical recruitment and lasting agency building
-

5

Reflective Professional Development

- Annual leadership development plan, leadership self-assessment, agency culture pulse check
- Outcome: identify gaps and plan annual CPD to close them

ANNUAL RENEWAL

MAINTAIN THE STANDARD

A STANDARD YOU RENEW
EACH YEAR



EVERY YEAR

- Renew your Aii individual affiliate membership
- Fulfil 20 CAB-CPD hours through Aii programmes
- Meet the prevailing annual CPD requirement for active agents
- Submit a truthful annual declaration and attestation
- Remain free of unresolved disciplinary matters

IF STANDARDS SLIP

- 01** Advisory note, written warning or mandatory ethics retraining
- 02** Corrective action plan with the Governing Council
- 03** Temporary suspension of the right to use CAB
- 04** Revocation of the designation in serious cases

ETHICS & CONDUCT

CAB CODE OF ETHICS AND CONDUCT

Four standards define how a CAB holder leads. You sign a Declaration of Observance on application and at every renewal.

01

Integrity and trustworthiness

Honest, respectful dealings. No misrepresentation, coercion or improper inducement — and zero tolerance for agent pinching or unfair solicitation.

03

Communication and representation

Accurate, complete and non-misleading records, publicity and CPD claims. Customer information kept strictly confidential.

02

Customer best interest

Needs-based advice suited to means and circumstances. No unsuitable or incentive-driven sales. Timely service to customers and beneficiaries.

04

Competence, care and supervision

Clear agency standards, monitoring of poor-conduct indicators, and corrective action where standards are not met.

BACKED BY GOVERNANCE

- Public registry of active holders on the Aii website
- Dedicated complaints channel: CAB@aiiasia.org
- Proportionate action — from advisory note to revocation
- Annual eligibility checks with LIAM and your company
- Right of appeal on defined grounds

5 STEPS TO CAB DESIGNATION

Complete the milestone programmes, secure your company's recommendation and attestation, submit your application and signed Declaration of Observance, and be conferred by the CAB Governing Council.

01 Complete PAMP

PAMP — 4 days of strategy, leadership, productivity and coaching.

02 Complete AMTC

AMTC — 23 weeks of practical agency-building capability.

03 Get recommended

Your company verifies your eligibility, CPD compliance and good standing, and issues the attestation letter.

04 Apply and declare

Submit the CAB application form and signed Declaration of Observance, with payment, to the CAB Secretariat.

05 Be conferred

The CAB Governing Council approves, and you are recognised before your peers.

CAB APPLICATION FEE & ANNUAL MAINTENANCE FEE

Attend recognition event

RM888

Robe, certificate and pin, digital certificate and badge, Aii affiliate membership

one-time

Without in-person event

RM338

Certificate and pin, digital certificate and badge, Aii affiliate membership

one-time

Annual maintenance

RM50

Aii affiliate membership required to keep CAB active

per year



Build an agency worth being chartered for.

Talk to your agency head or company training department about your CAB pathway, then write to the CAB Secretariat.

CAB@aiaasia.org



FREQUENTLY ASKED QUESTIONS

Q Is CAB just another training certificate?

No. Programmes are how you qualify. CAB is a professional Chartered designation you hold and maintain annually.

Q Who is eligible to apply?

Agency Managers of a Malaysian life insurer, recommended by their company via an attestation letter.

Q What must I complete to qualify?

PAMP, AMTC and the annual CAB-CPD requirement — three pillars in all.

Q Must the programmes be taken in a fixed order?

No fixed sequence. Most leaders take PAMP first, then AMTC.

Q Do CPD hours from other providers count?

No. The 20 CAB-CPD hours must be earned through Aii programmes; Aii's training record is authoritative.

Q Is CAB a lifetime designation?

No. It is renewed yearly — membership, 20 CAB-CPD hours, declaration and good standing.

FREQUENTLY ASKED QUESTIONS

Q How does CAB help me build a stronger agency?

It unites strategy, ethical recruitment, structured selection, coaching, performance management and retention.

Q What will it cost me to apply for CAB?

A one-time application fee of RM888 with the recognition event, or RM338 without, and an annual membership fee of RM50.

Q Do the CPD hours apply to me in 2026 and 2027?

2026 holders and those under the 2027 transition are exempted. Full compliance starts with the 2028 renewal.

Q What happens if I fall short or do not renew?

Aii places the renewal on hold and suspends the use of CAB until the shortfall is met. If your status lapses, CAB is revoked.

Q Can the designation be taken away?

Yes. Misconduct such as agent pinching or falsified records can lead to suspension or revocation.

Q How do my clients and recruits verify me?

Aii publishes a public registry of active holders. To start, speak to your agency head, then write to CAB@aiiasia.org.