


IFPA Resources Sdn Bhd (4051070-D)

 SEGi College Subang Jaya
 Persiaran Kewajipan USJ 1
 47600 UEP Subang Jaya
 Tel: 03-8605 3886 Fax: 03-8605 3816
 Website: www.ifpa.com.my

For Office Use Only

Date

Counselled by

Section A: Personal Particulars

Name : _____

 NRIC : _____ Gender : Male Female

Mailing Address : _____

Postcode : _____

 Tel (O) :
H/P :
 Tel (H) :
Fax :

Email : _____

Section B: Academic / Professional Background
**Highest Education
Attained:**

DEGREE / POST GRADUATE : _____

Section C: Employment Background

Name of Organization:	
Job Title:	
Industry Profile:	Insurance / Unit Trust / Banks / Accountants / Asset Mgmt / Non Finance Corp.
	Trust & Wills / Finance Companies / Stock Broking / Financial Advisory / Student

Section D: Course Details

Please enroll me in :

 Intake : _____ Centre : _____ First Sitting Re-sitting

 Certified Financial Planner (CFP)
 **Optional Module
Workshop**
 Islamic Financial Planning
 Module 1 : Foundation in
Financial Planning

 Module 2 : Insurance Planning
& Estate Planning

 Module 3 : Investment Planning
& Retirement Planning

 Module 4 Financial Plan
Construction & Professional
Responsibilities

 Estate Planning

 Retirement Planning

 Tax Planning

 Investment Planning

 Insurance Planning

 Module 1 : Foundation of Islamic
Financial Planning

 Module 2 : Risk Management & Takaful
Planning

 Module 3 : Islamic Investment Planning

 Module 4 : Zakat and Taxation
Planning

 Module 5 : Islamic Estate and Waqf
Planning

 Module 6 : Financial Planning
Construction

Section E: Payment Detail & List

Payment To IFPA

Course Fee (CFP)		Optional Module (CFP)		Course Fee (IFP)	
Registration		Registration	-	Registration	
Module 1		Estate Planning		Module 1	
Module 2		Retirement Planning		Module 2	
Module 3		Tax Planning		Module 3	
Module 4		Investment Planning		Module 4	
		Insurance Planning		Module 5	
				Module 6	
Total		Total		Total	
Grand Total					

Mode of Payment to IFPA:

By Cheque: No. _____ (Payable to "IFPA Resources Sdn Bhd") By Credit Card

Card No. Security No. Expiry Date

Cardholder's name : _____ Cardholder's Signature : _____

Payment & Refund Policies

A. Payment of Fees

1. A fees must be paid in full on or before the commencement date of the course. A late payment penalty charges of 5% will be imposed on ALL late payment.
2. Learning members will be barred from attending classes and/or assessment if fees remain unpaid.

B. Refund of Fees

1. All fees paid are NOT refundable unless the course does not commence or the candidate's application is rejected by IFPA. Once the course commenced, the course fee is considered fully consumed.
2. All withdrawals must be in writing at least 5 working days prior to the commencement date for full refund, administrative charge of RM200 will apply. Once the course has commenced, if candidate wishes to withdraw, he/she must write in within 10 working days from the commencement date.
3. All withdrawals are subject to an administrative charge of RM200 per module.

Declaration

I certify that the information given in this application and in the supporting documents is true and complete. I agree to abide by the rules and regulations of IFPA and / or the partner institution.

Applicant's Signature : _____ Date : _____

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Form Received On : _____ By Hand By Post By Fax Received By : _____

Payment Received On : _____ By Hand By Post Amount Received : _____

Official Receipt No. : _____

Rules and Regulations

All registration MUST be accompanied with the full payment. Kindly return the completed form together with payment to reach IFPA, Subang Jaya not later than minimum three (3) weeks prior to the date of the course to facilitate administrative arrangements. There is no refund for not turning up for the course, unless a written notice is given to IFPA at least one (1) week before the start of the class. IFPA reserves the right to make amendments to the programme without prior notice and to cancel or postpone the session if the minimum number of participants is not met.

SEGi College Subang Jaya, 10th Floor, Persiaran Kewajipan USJ 1, 47600 UEP Subang Jaya, Selangor Darul Ehsan.

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