

Guide to Withdraw EPF for CFP

CERTIFICATED FINANCIAL PLANNER (CFP)

INFORMATION ON EPF WITHDRAWAL

Eligibility:

- Malaysian citizen
- Still have savings in Account II
- Minimum academic requirements: Bachelor's degree
- Enrolled in CFP with an appointed education provider
- Registered as FPAM Trade Member
- Have not reached 55 years of age at the time your application is submitted

Documents Required:

- ✓ EPF Withdrawal Application Form
- ✓ MyKad (photocopy and Original A4 Size)
- ✓ Certified letter from FPAM (original and photocopy)
- ✓ Offer letter from FPAM (original and photocopy)
- ✓ Enrolment Confirmation letter (original and photocopy)
- ✓ Approval letter EPF for CFP course fee withdrawal (Certified True Copy)
- ✓ Degree certificate and transcripts (original and photocopy)
- ✓ Other document required by EPF

EPF Withdrawal Procedures:

Step 1:

- Complete EPF Withdrawal Request Form & FPAM Trade membership Application Form, submit to CFP education provider.
- Approximately 1-2 week after submitting EPF Withdrawal Request Form to IFPA, collect 3 official letters (Certified Letter, Offer letter and Enrolment Confirmation Letter) issued by Financial Planning Association of Malaysian (FPAM) from IFPA

Step 2:

- Proceed to any EPF branch (e.g. Jalan Gasing Branch) with all the required documents.
- Complete the KWSP 9H (AHL) form (get the form EPF branch or download online at <http://www.kwsp.gov.my/portal/ms/web/kwsp/member/education-withdrawal>)

Step 3:

- Upon approval, KWSP will release the money to FPAM.
- If you have prepaid the fees (tuition fees and exam fees), you will get reimbursement cheque from FPAM in about 1 month time after FPAM has received your money from KWSP
- If you intend to use your EPF money to directly pay to IFPA for your CFP tuition fee, then you **MUST apply for the EPF withdrawal at least 8 weeks before the commencement date of the CFP course**, or else, you will need to pay for your tuition fee first then get reimbursement from EPF.

Contact IFPA:**IFPA Resources Sdn Bhd**

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