

USER MANUAL

MODULE: CONSULTANT MANAGEMENT GROUP: CONSULTANT

AGENCY NAME	:	FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
DOCUMENT DATE	:	24/04/2025
DOCUMENT VERSION	:	1.2

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	i

DOCUMENT DESCRIPTION

This document is prepared to explain how to use the FCS system. This user manual explains the functions and step by step how to use the system completely to the users involved.

Document Information	
Project Name	SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING
	AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF
	INVESTMENT MANAGERS MALAYSIA (FIMM)
Document Name	User Manual
Document Reference No	ZANKO/FIMM/UM/v0.1
Property	Zanko Sdn Bhd
Document Date	24/03/2025

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	v

DOCUMENT CONTROL

	Version History					
Version No	Version Date	Summary	Writer			
0.1	23/03/2025	First draft document	Wan Arissa Insyirah binti Wan Aniff			
1.0	24/03/2025	Final Document	Wan Arissa Insyirah binti Wan Aniff			
1.1	08/04/2025	Updated Document	Johari Amzat			
1.2	24/04/2025	Final Document	Johari Amzat			

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	vi

CONTENT

DOCU	MENT DESCRIPTION	i
DOCU	MENT CONTROL	v
CONT	ENT	vi
LIST C	F FIGURES	viii
LIST C	OF TABLES	xiii
ACRO	NYM	xiv
ABBRE	EVIATIONS ROLE	xv
CHAP	TER I: INTRODUCTION	16
Α.	Purpose	16
В.	Contact Information	16
CHAP	TER II: GENERAL SYSTEM INSTRUCTION	17
Α.	System access	20
В.	Steps to Open the FCS System Website:	20
CHAP	TER III: CONSULTANT MANAGEMENT MODULE	22
Α.	First Time Login by Consultant	22
В.	Email Change Request Process	26
C.	Log in	28
D.	Update Account and Password	
E.	Dashboard Notification	33
F.	New Registration	34
G.	Application Returned	64
Η.	Reschedule Exam	65
I.	Exam Booked	68
J.	For Exam Failed (Resit)	69
K.	Apprentice Program (AP) Enrolment	70
L.	Pending AP Enrolment	70
Μ.	Failed CAS Screening	72
N.	Failed Bankruptcy Screening	73
Ο.	Appeal for Exam Result	75
Ρ.	Appeal for Fee Waiver	76
Q.	Appeal Returned by Distributor	79
R.	Profile Maintenance	83
S.	Returned Profile Update	93
Т.	Failed Bankruptcy Screening (Profile Update)	95
U.	Variation of Registration	97

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	vii
V.	CONTINUING PRO	DFESSIONAL D	EVELOPMENT (CPD)	MODULE		129
W.	Renewal					148
Х.	Appeal for Revocat	tion				155
Υ.	Forget Password					164

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	viii

LIST OF FIGURES

Figure 1: First Time Login Process Flow	22
Figure 2: First Time Log In Button	22
Figure 3: First Time Log In Pop Up Box	23
Figure 4: Prompt Message For Non Exist User	23
Figure 5: Email Address For First Time Login	24
Figure 6: Link for First Time Login	24
Figure 7: First Time Log In Email	24
Figure 8: First Time Login Reset Password	25
Figure 9: Prompt Message for Non-Exist Email	25
Figure 10: Email Change Request form	26
Figure 11: FCS Homepage Display	28
Figure 12: Log in Display	29
Figure 13: Incorrect User Id and Password Message Display	29
Figure 14: Profile Submenu	30
Figure 15: My Profile Display	31
Figure 16: Change Password Page	31
Figure 17: Error Message Display	32
Figure 18: Error Message Display	32
Figure 19: Successful Message Display	32
Figure 20: Dashboard Notification	33
Figure 21: New Registration Process Flow	34
Figure 22: User Type Display	34
Figure 23: Malaysian Sign Up Display	35
Figure 24: Non-Malaysian Sign Up Display	35
Figure 25: Account Information Display	36
Figure 26: Log In Page With Verification Email Link Message	37
Figure 27: Verification Email	37
Figure 28: Activated Account Message	37
Figure 29: Login Page	38
Figure 30: Profile Page	38
Figure 31: Request TAC Inserted Display	39
Figure 32: Wrong TAC Error Message	39
Figure 33: Error Message	40
Figure 34: Consultant Registration Section	40
Figure 35: Profile Details section - Malaysian	41
Figure 36: Profile Details section - non-Malaysian	42
Figure 37: Upload ID Display (Malaysian)	43
Figure 38: Upload ID Display (Non - Malaysian)	44
Figure 39: Inserted Images	45
Figure 40: Uploaded ID	45
Figure 41: Upload Images Message	46
Figure 42: Academic Qualification section	46
Figure 43: Qualification Level	46
Figure 44: SPM/SVM Items Display	47
Figure 45: STPM/STAM Items Display	48
Figure 46: Diploma, Degree, Master, PHD Items Display	48
Figure 47: Button to Remove Qualification Level	48

risasa	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	ix
Figure 48:	View Uploaded Ce	ertificate				49
Figure 49:	Scheme Selection	section Form				49
Figure 50:	UTS List of Distrib	utors				49
Figure 51:	Non – CUTA/CPR	A Type of Distrib	outor			50
Figure 52:	CMSRL Requirem	ent Section				50
Figure 53: CMSRL Requirement - Yes						51
Figure 54: CMSRL Requirement – No					51	
Figure 55: Type of Registration section				52		
Figure 56:	Center Location					52

Figure 55: Type of Registration section	
Figure 56: Center Location	52
Figure 57: Booking Location Calendar	53
Figure 58: Popup Message	53
Figure 59: Exam Session Details	54
Figure 60: Booking Details	54
Figure 61: Exemption Rules and Regulations	55
Figure 62: Exemption Types	55
Figure 63: Exemption Type Lists	55
Figure 64: Exemption Type for Former Consultant with no CMSRL	56
Figure 65: Exam Validity - Error Message	56
Figure 66: Re - Registration Error Message	57
Figure 67: Active UTC - Error Message	58
Figure 68: Insurance Agent - Error Message	
Figure 69: Staff of Takaful Broker	59
Figure 70: Exemption Type – Financial Planner (Certified)	59
Figure 71: Screening section	60
Figure 72: Others section	60
Figure 73: Upload Supporting Document	60
Figure 74: Supporting Document Details	61
Figure 75: Error Message for Rename File Name	61
Figure 76: FIMM - Consent Form	61
Figure 77: Save as Draf Message	61
Figure 78: Successful Message	62
Figure 79: Draft Application Status	62
Figure 80: Declaration	62
Figure 81: Error Message	63
Figure 82: Confirmation Message	63
Figure 83: Submitted Message	63
Figure 84: Submit Application Status	63
Figure 85: Application Status - Returned	64
Figure 86: Return Comment from Distributor	64
Figure 87: Successful Message	65
Figure 88: Application Status – Submitted	65
Figure 89: Application Status - Pending Examination	65
Figure 90: Type of Registration page – Examination	66
Figure 91: Exam Session - Error Message	66
Figure 92: New Selected Exam Sessions	67
Figure 93: Successful Application Message	67
Figure 94: Pending Examination	68
Figure 95: Exam Details	68
Figure 96: Application Status - Exam Failed	69

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	x

Figure 97: Successful Message	69
Figure 98: Application Status	70
Figure 99: Pending AP Enrolment	70
Figure 100: Professional Body – FPAM	71
Figure 101: Professional Body - MFPC	71
Figure 102: Successful Message	72
Figure 103: Application Status – Submitted	72
Figure 104: Failed CAS Screening	73
Figure 105: Application Status – Submitted	73
Figure 106: Failed Bankruptcy Screening	74
Figure 107: Appeal for Exam Result Process Flow	75
Figure 108: Consultant Sub Menu	75
Figure 109: Appeal for Fee Waiver Process Flow	76
Figure 110: Consultant Sub Menu	76
Figure 111: Application Status	77
Figure 112: Appeal for Fee Waiver Tab	77
Figure 113: Confirmation to Proceed Message:	
Figure 114: Mandatory Field Required Message	
Figure 115: Success Message	
Figure 116: Appeal for Fee Waiver Application Status	
Figure 117 [.] Appeal Exam Result Sub Menu	79
Figure 118 ⁻ Appeal Fee Waiver Application Status - Returned	80
Figure 119 ⁻ Distributor Comment	81
Figure 120 ⁻ Confirmation Message	82
Figure 121: Successful Message	82
Figure 122: Submitted Appeal Fee Waiver Application Status	
Figure 122: Consultant Update Profile Process Flow	83
Figure 124: Consultant Submenu	83
Figure 125: Registration Info	
Figure 126: Profile Detail	
Figure 127: Actions Menu	85
Figure 128: Profile Undate Section (Malaysian)	86
Figure 129: Profile Details section (non-Malaysian)	
Figure 130: Undate Qualification Section	
Figure 131: Scheme Selection Section	
Figure 132: Type of Registration – Examination	
Figure 133: Type of Registration Section – Exemption	89
Figure 134: AP Completion section	90 90
Figure 135: Screening Section	90 90
Figure 136: Support Document Details	
Figure 137: Error Message for Rename File Name	Q1
Figure 138: Undate Others Section	
Figure 139: Update Profile Application - Declaration	
Figure 140: Confirmation Message	92
Figure 141: Submitted Message	 ดว
Figure 142: Submitted Undate Profile Application Status	02 02
Figure 143: Undate Profile Application Status - Returned	۵۵ مور
Figure 144: Return Comment from Distributor	۵ <i>۵</i>
Figure 145: Confirmation Massage	
i iyure 140. Cutilittialiuli messaye	

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	xi
Figure 146: Submitted Message95						95

Figure 147: Submitted Update Profile Application Status	95
Figure 148: Application Status – Submitted	96
Figure 149: Failed Bankruptcy Screening	96
Figure 150: Variation of Registration Process Flow	97
Figure 151: Submenu for Variation Registration	97
Figure 152: Registration Info	98
Figure 153: Profile Detail	98
Figure 154: Submenu Variation Registration	99
Figure 155: Application Confirmation Message	99
Figure 156: Application Successful Message	99
Figure 157: Profile Details section (Malaysian)	100
Figure 158: Profile Details section (non-Malaysian)	101
Figure 159: Academic Qualification section	102
Figure 160: List of Distributors	102
Figure 161: Non – CUTA/CPRA Type of Distributor	103
Figure 162: CMSRL Requirement Section	103
Figure 163: CMSRL Requirement - Yes	104
Figure 164: CMSRL Requirement – No	104
Figure 165: Type of Registration section	105
Figure 166: Center Location	105
Figure 167: Booking Location Calendar	105
Figure 168: Popup Message	106
Figure 169: Exam Session Details	106
Figure 170: Booking Details	107
Figure 171: Exemption Rules and Regulations	107
Figure 172: Exemption Types	107
Figure 173: Exemption Type Lists	108
Figure 174: Exemption Type for Former Consultant with no CMSRL	108
Figure 175: Re - Registration Error Message	109
Figure 176: Active UTC - Error Message	110
Figure 177: Insurance Agent - Error Message	111
Figure 178: Staff of Takaful Broker	111
Figure 179: Example of Full Exemption Form	112
Figure 180: Screening section	112
Figure 181: Others section	113
Figure 182: Upload Supporting Document	113
Figure 183: Support Document Details	114
Figure 184: Error Message for Rename File Name	114
Figure 185: FIMM - Consent Form	114
Figure 186: Save as Draf Message	114
Figure 187: Successful Message	115
Figure 188: Draft Application Status	115
Figure 189: Declaration	115
Figure 190: Error Message	116
Figure 191: Confirmation Message	116
Figure 192: Submitted Message	116
Figure 193: Submit Application Status	116
Figure 194: Variation Application Status - Returned	117
o 11	

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malavsia	Federation of Investment	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	xii
Figure 194	5. Return Comment	from Distributor				118
Figure 196	6: Successful Mess	ade				118
Figure 197	7: Application Statu	s – Submitted				110
Figure 198	R: Application Statu	s - Pending Exa	mination			119
Figure 190	9: Type of Registrat	tion nade – Exam	nination			110
Figure 200): Fyam Session - I	Fror Message				120
Figure 201	1: New Selected Ex	am Sessions				120
Figure 202	2: Successful Annlig	cation Message				121
Figure 202	2: Successful Mess	ane				127
Figure 204	1: Pending AP Enro	lment				122
Figure 20 ⁴	5: Professional Bod	ν _ ΕΡΔΜ	••••••			122
Figure 206	6: Professional Bod	y - MFPC				123
Figure 207	7: Successful Mess	aue				120
Figure 208	R: Application Statu	s – Submitted				124
Figure 200	Contraction State	enina				125
Figure 210): Application Statu	s _ Submitted				125
Figure 21	1. Eailed Bankruntc	s – Subinitieu				126
Figure 212	2: Submenu for Var	iation Registratio	 חר			126
Figure 212	2. Oublinenti ior var 3. Profile Detail		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			120
Figure 21	1: Variation Menu					127 127
Figure 214	Vanauon Menu 5: Monu					130
Figure 210	S. Meriu S. Submenu					130
Figure 217	7: List 5 Module					131
Figure 217	R. Eist 5 Module					131
Figure 210	D. Fillel D: Pocot					122
Figure 218	9. Resel): Filtor Total Entria	······			•••••	122
Figure 220	J. Filler Tolai Enline				•••••	I JZ
Figure 22	Provide Entres				•••••	122
Figure 222	2. Paginalion					124
Figure 223	5. Submit 5 Module					125
Figure 224						105
Figure 22	5: Popup Message				•••••	130
Figure 220	5: FOIM 5 Module				•••••	130
Figure 227	7: Form 5 Module				•••••	137
Figure 220	5: Form 5 Module				•••••	138
Figure 228	9: Form 5 Module				•••••	138
Figure 230	J: Form 5 Module				•••••	139
Figure 23	1: Form 5 Module				•••••	140
Figure 232	2: Upload				•••••	140
Figure 23					•••••	140
Figure 234	+: Popup Message				•••••	141
Figure 23	D: Error Message					142
Figure 236	D: Popup Message					142
Figure 23	C Popup Message					143
Figure 238	5: Popup Message					144
Figure 239	9: LIST 5 MODULE					145
Figure 240	J: ⊢orm					146
Figure 24	1: LOG					147
Figure 242	2: Profile Managem	ent Sub Menu				148
Figure 243	3: Registration Info					149

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	xiii

Figure 244: Profile Detail	.149
Figure 245: Action Sub Menu	150
Figure 246: Renewal page	152
Figure 247: Popup Proceed Message	152
Figure 248: Pop Up Submitted Message	.153
Figure 249: Renewal Submitted Status	.153
Figure 250: Renewal - Insufficient CPD Points	.154
Figure 251: Unsaved Data Message	.154
Figure 252: Application Status submenu	.154
Figure 253: Profile Management Sub Menu	.155
Figure 254: Registration Info	.156
Figure 255: Consultant Profile page	.156
Figure 256: Action Sub Menu	.157
Figure 257: Appeal Request Sent Pop Up Message	.157
Figure 258: Appeal Revocation Tab	.158
Figure 259: Appeal for Revocation Required Fields	.159
Figure 260: Action Buttons	.159
Figure 261: Mandatory Field Message For Save Action	.160
Figure 262: Proceed Saving Data Message	.160
Figure 263: Save As Draft Message	.160
Figure 264: Mandatory Field Required Message	.161
Figure 265: Confirmation Message	.161
Figure 266: Submitted Appeal for Revocation Message	.161
Figure 267: Application Status	.162
Figure 268: Discard Application Confirmation Message	.162
Figure 269: Application Discarded Prompt Message	.163
Figure 270: Unsaved Data Pop Up Message	.163
Figure 271: Login Page	.164
Figure 272: Forgot Password Pop Up Box	.165
Figure 273: Change Email Address Prompt Message	.165
Figure 274: Reset Password Link	.166
Figure 275: Reset Password Page	.166
Figure 276: Login Page	.167
Figure 277: Forgot Password Pop Up Box	.168
Figure 278: Change Email Address Prompt Message	.168
Figure 279: Email Change Request form	.169

LIST OF TABLES

Table 1: Acronym Table	xiv
Table 2: Abbreviation Role Table	XV

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	xiv

ACRONYM

ACRONYM	DESCRIPTION
CAS	Consultant Alert
CEILLI	Certificate Examination in Investment-Linked Life Insurance

Table 1: Acronym Table

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	xv

ABBREVIATIONS ROLE

Abbreviation	Role	Descriptions
SYS	SYSTEM	System generated transactions
C-CLRK	Consultant Applicant	Consultant applicant during first account creation
C-CON	Consultant	Consultant role after becoming a consultant either active or in- active
C-APP	Consultant Applicant	Consultant applicant once submitted the application to distributor

Table 2: Abbreviation Role Table

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	16

CHAPTER I: INTRODUCTION

The **FCS System User Manual** is designed to provide users with a comprehensive guide to effectively utilizing the **FCS system**. This manual serves as a reference document to help users understand the system's functionalities, features, and processes to ensure smooth operation and efficient task completion.

By following the instructions in this manual, users will be able to navigate the system with ease, perform necessary actions, and troubleshooting common issues. The manual is structured to accommodate both new and existing users, offering clear step-by-step guidance for system access and usage.

A. Purpose

The purpose of this manual is to equip users with the essential knowledge required to maximize the benefits of the **FCS system**. It provides:

- A detailed overview of the system's functions and capabilities to help users understand its key features.
- Step-by-step instructions on accessing and operating the system efficiently.
- Guidelines on alternative modes of operation and contingencies in case of system issues or errors.
- Best practices and recommendations for optimal system use.

This manual ensures that users can confidently navigate the system while maintaining security, accuracy, and efficiency in their tasks.

B. Contact Information

If users require further assistance or encounter any issues while using the **FCS system**, they can contact the **Federation of Investment Managers Malaysia (FIMM)** for support.

Support Contact Details:

Email: itsupport@fimm.com.my

Website: https://www.fimm.com.my

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	17

CHAPTER II: GENERAL INSTRUCTION TO USE THIS MANUAL

Reminder: Please read this section for a better understanding of the user manual.

There are three different categories in the Consultant Module:

No	Type of consultant	Steps	Required Documents
1	Never registered	Registration	<u> </u>
	with FIMM or <u>inactive before</u> <u>April 2022¹</u> (Group A)	 Liaise with your preferred distributor before registering in the FCS. Register as a New Consultant 	 Coloured passport photo (follow the Registration Manual's resolution guidelines). Coloured NBIC /
		 by following Chapter III, Section F in this document. Once you submitted your 	Active Passport (front & back). 3. Relevant supporting
		 Once you submitted your application, your preferred distributor will do their review and approval process. Any inquiry please liaise with them. Once approved, you will receive confirmation email for Examination date as stated in Chapter III, Section F, Item 38 – Examination. Should you fail your exam and you have a valid proof/ reason, you may choose to Appeal your exam result as stated in Chapter III, Section O – Appeal Exam Result² Should you unable to sit for your exam and you have a valid proof/ reason, you may choose to Appeal your exam fee waiver as stated in Chapter III, Section P – Appeal Exam Fee Waiver³ Once you have become FIMM Active consultant and intend to vary your license, please follow Chapter III, Section U – Variation of Registration 	3. Relevant supporting documents, e.g., SPM, Diploma, etc.

¹ All inactive consultants before April-2022 are considered as new applicant. ² Subject to distributor and FIMM approval. Additional costs may apply.

³ Subject to distributor and FIMM approval. Additional costs may apply.

•			L
			L
Federation of I	nvestment Mana	agers Malaysia	

		Section for	Group A:			
		Chapter	Section	ltem		
		111	F	Registration		
		111	F (Item	Examination		
			38)			
		111	0	Appeal for		
				Exam Result		
		111	Р	Appeal for		
				Exam Fee		
				Waiver		
2	Inactive	1. Accour	nt Activatio	n		
	consultants (from	1. Liai	ise with yo	ur preferred	1.	Coloured passport
	April 2022	dist	tributor bef	ore registering in		photo (follow the
	onwards) ⁴	the	FCS.			Registration Manual's
		2. Act	ivate your	account by		resolution guidelines).
	(Group B)	follo	owing Cha	pter III, Section		
		Α.		_		
		3. If yo	ou need to	change your		
		reg	istered em	ail, follow		
		Cha	apter III, S	ection B.		
		0 5 1				
		2. Registr	ation			
		1. Liai	ise with yo	ur preferred	1.	Coloured passport
		dist		ore registering in		photo (follow the
		tne	FCS.			resolution guidelines
		Z. Re	gister as a	New Consultant	2	provided).
		by I	iollowing C	napter III,	Ζ.	Coloured NRIC /
				mitted your		Active Passport (Ironic
		3. Uli	ve you sub	nnilled your	2	& Dack). Relevent supporting
		app	ributor will	do their review	З.	documente e a SPM
		uisi	l approval			Diploma etc
		and approval process. Any				Dipioma, etc.
		Inquiry please liaise with them.				
		4. Once you have become FIMM				
		vary your license inlease				
1		follow Chapter III Section II –				
		Variation of Registration				
		· ai		3		
		Section for	Group B.			
		Chapter	Section	Item		
			Α	Account		
1				Activation		
		111	F	Registration		
		111	U	Variation of		
				Registration		

⁴ All inactive consultants before April-2022 are considered as new applicant.

	Fe
Federation of Investment Managers Malaysia	Ma

Project	Reference	File	Version	Date	Page
ederation of Investment anagers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	19

		III	V	CPD		
				submission		
3	Active consultants	1. Accour	nt Activatio	n		
	(Group C)	1. Act foll A .	ivate your owing Cha	account by pter III, Section	1.	Coloured passport photo (follow the resolution guidelines
		2. If you need to change your registered email, follow Chapter III, Section B.			2.	Colour NRIC/ Active Passport (front & back)
		 Once logged in, update your profile details as per Chapter Section D 			3.	Relevant supporting documents.
		 4. If intend to vary your license, please follow Chapter III, Section II – Variation of 				
		Registration 5. For CPD submission follow Chapter III				
		6. For Renewal declaration follow Chapter III, Section W –			,	
		Renewal				
		Chapter	Section	Item		
			Α	Account Activation		
		111	III R Profile Maintenance			
			U	Variation of Registration		
		111	V	Submission		

The Consultant Management Module is responsible for handling the registration, profile maintenance, compliance, and operational processes for consultants within the FIMM Registration System. This module ensures that consultants meet regulatory requirements, maintain compliance, and manage their professional status efficiently.

Sub-Modules of the Consultant Management Module:

- 1. First Time Login Guides for Group B & C in setting up their accounts.
- 2. **Registration** Facilitates the registration of new consultants (Group A), including identity verification and document submission.
- 3. **Appeal for Exam Result** Provides a process for consultants to appeal their examination results.
- 4. Appeal for Fee Waiver Enables consultants to request a waiver for specific fees.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	20

- 5. **Profile Maintenance** Enables consultants to manage and update their personal and professional details.
- 6. **Variation of Registration** Allows consultants to modify their registration details or update their associated distributor.
- CPD Consultant to attend training and obtain CPD points for their Renewal and Reregistration.
- 8. **Renewal** Manages the annual renewal process for consultants, including compliance checks.
- 9. **Appeal for Revocation** Facilitates the appeal process for consultants whose registrations have been revoked.
- 10. Forget Password Provides a password recovery process for consultants.

A. System access

The FCS system application is accessible only to registered users. Each user must use a unique User ID and password to log in securely. To access the system, users must navigate to the **main login page** (<u>https://fcs.fimm.com.my</u>) and enter their credentials.

Users from **Group A** will need to create a new account from the main login page (Chapter III, Section F Registration). Users from **Group B and C** will be required to activate their account (Chapter III, Section A Account Activation).

For security reasons:

- 1. Users should keep their login credentials confidential.
- 2. Passwords should be changed periodically to enhance security.
- 3. In case of forgotten credentials, users can use the **"Forgot Password?"** option to reset their password.

B. Steps to Open the FCS System Website:

- 1. Launch your web browser (Google Chrome, Mozilla Firefox, Microsoft Edge, etc.)
- 2. Enter the FCS System URL in the address bar and press Enter.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	21

- 3. The login page will appear, allowing users to enter their credentials.
- 4. For consultant please login using NRIC (without "-") / Active Passport

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	22

CHAPTER III: CONSULTANT MANAGEMENT MODULE A. First Time Login by Consultant

Note: This section is only applicable for Group B & C only (Existing Consultant).



Figure 1: First Time Login Process Flow

button

1. On the Log In Page, locate the 'First Time Login'

	🛓 Log In 🔐 Sign Up
	Please Login First
	LOG IN
	User ID
	Password
	Login
[]	Forgot Password?
Click 'First Time	First Time Login
Login	

Figure 2: First Time Log In Button

2. System will display popup box to enter the NRIC / Passport No.

Federation of Investment Managers Malaysia (FIMM) ZANKO/FIMM/UM/V0.1 User Manual Document 1.0 24/03/25 First Time Login NRIC / Passport No	24/03/25 23
First Time Login NRIC / Passport No	×
NRIC / Passport No	×
NRIC / Passport No	
Disease optory our NDIC No / Decement No	
Please enter your NRIC NO / Passport No	

Figure 3: First Time Log In Pop Up Box

Submit

- 3. User need to fill in detail in required fields:
 - a. NRIC No (Malaysian)
 - b. Passport No. (Non-Malaysian)

4. User click

a. If the entered NRIC / Passport No does not exist, system will prompt a message
 "User does not exist. Please sign up before you attempting to sign in."



Figure 4: Prompt Message for Non-Exist User

b. If the entered NRIC / Passport No. exists, the system will display the email address field for input. The email address must match the one registered with FIMM during the initial registration. Kindly ensure that the provided email is active and accessible, as the password reset link will be sent to the designated email address.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	24

First Time Login	×
Email Address	
Please enter your active email address	
	Submit

Figure 5: Email Address for First Time Login

- 5. User fill in the email address and click Submit
 - a. If the entered email address existed in consultant data, system will display a prompt message "A verification link has been sent to <email address>. Please click the link provided to get started. If the email address is no longer in use, click new email address" and send a verification link via email.

\bigcirc	
A verification link has been sent to (te******01@yopmail.com), please click the get started. Kindly check your junk/spam mailbox if you still haven't received email, Click here to resend the email or please contact registration@fimm.co	link to I the n.my
CHANGE EMAIL ADDRESS	NO

Figure 6: Link for First Time Login

b. User need to check their registered email. Please ensure the email address is active and accessible in order to receive the "Reset Password" email.



Figure 7: First Time Log In Email

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	25

- c. Click '(Here)'. User will redirect to the reset password page.
- d. User need to fill in details in required fields:
 - i. Password
 - ii. Confirm Password



Figure 8: First Time Login Reset Password

- e. Click
- f. User successfully reset the password and able to login.
- g. After successful login please update your profile photo and verify your phone number.
- 6. If the entered email address does not exist in consultant data, system will prompt a message "We couldn't find a matching email address. Would you like to change your email?"



Figure 9: Prompt Message for Non-Exist Email

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	26

7. If consultant click **CHANGE EMAIL ADDRESS** button, system will proceed to email change request process.

B. Email Change Request Process

- 1. User click CHANGE EMAIL ADDRESS
- 2. System will display email change request form to fill in with details:
 - a. NRIC / Passport No (Auto populate based on registered NRIC / Passport No)
 - b. New Email Address
 - c. Selfie (Note: User need to take a selfie with NRIC / Passport. Please ensure the picture and details are clear.)

Email Change Request	×
NRIC / Passport No	
860707065678	
New Email Address	
Please enter your new Email	
Selfie *Take a selfie with your NRIC/Passport. Please ensure the picture and details are clear	
The screen capture will appear in this box.	
S	ubmit

Figure 10: Email Change Request form

- 3. The consultant fills in the details and Submit button. System will send the application to Distributor or FIMM for approval process.
- 4. For <u>Group C</u>, once you submitted the change email request application, please contact your distributor to initiate the approval process.
- 5. You will be notified via email (to your newly provided email) once your change email request is approved.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	27

6. Proceed to do 'Forgot Password' by following section A to reset your password.

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	28

C. Log in Access the Login Page

For those in <u>Group B & C (Existing Consultant)</u> and have activated their account please login as define in this section. If you have not activate your account, please do so by following the instructions provided in **Section A – First Time Login** (For Existing Consultant – active and inactive status).

- 1. For **Group A**, please follow provide guidelines as outline in this section.
 - a. On the homepage, locate the 'Log in' button and click it.
 - b. In the User ID field, enter your registered NRIC / Active Passport number without " - ".
 - c. In the **Password** field, enter your **password**.



Figure 11: FCS Homepage Display

2. Enter Your Credentials

- a. System will show sign in page; User need to insert these items:
 - i. User ID
 - ii. Password
 - iii. TAC (for 2FA)

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	29



Figure 12: Log in Display

3. Successful Login

- a. Click Login button to login to the system.
- b. If log in not successful, the system will display an error message.



Figure 13: Incorrect User Id and Password Message Display

- c. User need to re-enter id, password or verification and click button.
- d. If user still cannot log in to the system, for Group B and C please follow section A by activating your account first before proceeding to login.
- e. For Group A, please follow section III.F to register your account.
- f. Should all the methods have been done, please proceed to section **III.Y** for resetting your password.

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	30

D. Update Account and Password

1. Update Account

a. Click icon at the far right of the system. The system will display Profile update submenu.



Figure 14: Profile Submenu

- b. Click 'Account' and system will show profile update page.
- c. User can update the following information:
 - i. Profile Picture
 - ii. Email

d. Click

- iii. Phone Number (Request TAC)
- iv. TAC number
 - save Image button and system will update profile picture.
- e. Click Verify Email button and system will send email verification to your email.
- f. Click Save Phone Number button and system will update the phone number.

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	31
		1210				

Profile Change Passw	ord			
Profile				
	NRIC No			
	111111-22-0	001		
	Name			
	NH EEDA			
	Email			
	nheedazirid	@yopmail.com	Vorify Email	
	Phone Numb	er		
	+60	0175106396	Request TAC	
Choose File Save Image	ТАС			
			Save Phone Number	0

Figure 15: My Profile Display

2. Update Password

a. Should you intend to change your password. Please Click 'Change Password' at account page. System will display Change Password page.

Profile	Change Password	
Change P	assword	
Curr	ent Password	
8 New	Password	
D Uppercase		
Lowercase		
Number (0-	9)	
Special Cha	aracter (!@#\$%^&*)	
At least 8 C	haracter	
A Con	firm New Password	
Matching Pa	assword	
		Submit

Figure 16: Change Password Page

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	32

- b. User can insert this information:
 - i. Current Password
 - ii. New Password
 - iii. Confirmation New Password
- c. Click submit button to update new password.
 - i. If the entered password does not meet the format, the system will display error message.

A	
✔ Uppercase	
✓ Lowercase	
✓ Number (0-9)	
Special Character (!@#\$%^&*)	
✓ At least 8 Character	
Password not valid. Please check the requirement	
A	
Matching Password	
Password does not match.	

Figure 17: Error Message Display

ii. If the current password entered is not the same, the system displays an error message.



Figure 18: Error Message Display

iii. If the password is successfully updated, the system displays a notification message.



Figure 19: Successful Message Display

Fimm	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	33

E. Dashboard Notification

1. Click the notification icon at the far right of the system. The system will display the list of notification message. You will receive a notification for approved, rejected, or returned application if any.



Figure 20: Dashboard Notification

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	34

F. New Registration

This section for **Group A**, please follow the guidelines provided in Chapter II for better explanation.



Figure 21: New Registration Process Flow

1. On the homepage, locate the 'Sign Up' button and click it. The system will display the user type.

🛦 Log In 🔒 Sign Up
Please Login First
SIGN UP
Distributor 🔹
USER TYPE
Consultant
Distributor
Exam Site Coordinator (ESC)
Training Provider
Non-Member Fund Provider

Figure 22: User Type Display

- 2. User need to choose 'Consultant'.
- 3. Enter NRIC Number for Malaysian.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	35
		🛔 Log in	Sign Up			
		sic	SN UP			
		Consultant	•			
		Malaysian	Nop-Malaysian			

NRIC No.

8

Figure 23: Malaysian Sign Up Display

4. Enter Passport Number and Passport Expiry Date for Non-Malaysian.

	≜ Log in. 🔒 Sign Up
	SIGN UP
	Consultant -
	Malaysian Non-Malaysian
	A Passport Number
	Putsport Expline Duto
	dd/mm/yyyy
Click 'Next'	Next

Figure 24: Non-Malaysian Sign Up Display

- 5. Click Next .
- 6. The system will display the Account Information Page, user need to insert these items:
 - a. Email

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	36

- b. Password
- c. Confirm Password
- d. Checkbox "I agree to FIMM's Privacy Notice"

	≜ Log In 🔒 Sign Up
	Account Information
	Email
	B Password 💿
	★ Lowercase ★ Number (0-9) ★ At least 8 Character
	🔒 Confirm Password 💿
ick Checkbox	Matching Password I agree to FIMM's Privacy Notice
	Submit
	Back

Figure 25: Account Information Display

- 7. Tick the FIMM's Privacy Notice agreement checkbox.
 - , the system will display the Sign-Up Page.
- 9. Click submit, the user will be redirected to the Log In page with the

verification email link message above.

8. Click

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	37
		Log In A verification I battestigyopmai.co get started. Kindly chu if you do not receive d received the e registration User ID Password Forgot First	A Sign Up link has been sent to one, Please click the link to eck your junklapam mailbox the email. If you still haven't mail, please contact ngfimm.com.my. OG IN Login Password? Time Login	·		

Figure 26: Log In Page With Verification Email Link Message

10. User need to check their email and click the Verification Link button.

	Activation Email On Fimm Registration
	Hello
	Active Your Account
Click "Verification Link'	Verification Link
	https://fcs-stg.fimm.com.my/

Figure 27: Verification Email

11. System will display the Log In page with Your Account Had Been Activated message.



Figure 28: Activated Account Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	38

12. User now can Log In by inserting registered NRIC / Passport number as the User ID and the password.

13. Click	L	ogin		
		0	🛓 Log In	🖨 Sign Up
			Your Account Had Been / Login To Th	Activated.You Now Can ne System
			LOG	N
			950303323456	
[
Clic	k 'Login'		Log	in
			Forgot Pas	ssword?
			First Tim	e Login

Figure 29: Login Page

14. System will display Profile Page.

		NRIC No	
		Email	-
		battest1@yopmail.com	
		Name (as per NRIC / Passport) *	
Choose File No file c	hosen 0	Phone Number * +60	
		Request TAC	Click 'Request

Figure 30: Profile Page
	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	39

- 15. User need to insert the following item:
 - a. Profile Image
 - b. NRIC / Passport No (Automated Display Field)
 - c. Email (Automated Display Field)
 - d. Name (as per NRIC / Passport)
 - e. Phone Number
- 16. To save the information user need to request for TAC code by clicking



- 17. TAC will be sent to user through message.
- 18. Once user got the TAC, insert the TAC number. Then click

Request TAC	
TAC	
416968	

Figure 31: Request TAC Inserted Display

19. If user inserted the wrong TAC number, the system will display an error message.



Figure 32: Wrong TAC Error Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	40

20. If user did not insert profile picture, the system will display an error message.



Figure 33: Error Message

21. After clicking save button, system will display the registration section.

1 Profile D	etails					
-	A	Personal Del	lails			
Z Academi	c quaincations	Name (As Per NRIC)	NUR BATRISYI	A BINTI AZMIE		E
3 Scheme	Selection	NRIC No	950303323456		Upload your ID	1 AR
4 Type of I	Registration	Race	- Choose	Nationality	Malaysian	
5 Screenin	0	Date of Birth	03/03/1995	Age	30	
		Gandar	Chesses			

Figure 34: Consultant Registration Section

22. User need to complete **Profile Details section** by inserting following items:

a. Malaysian

- i. Name (Automated Display Field)
- ii. NRIC No (Not Updatable)
- iii. Date Of Birth (Not Updatable)
- iv. Race
- v. Nationality (Automated Display Field)
- vi. Date of Birth (Auto populate based on NRIC)
- vii. Age (Automated Display Field)
- viii. Gender
- ix. Address
- x. Postcode

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	41

- xi. City (Auto populate based on Postcode)
- xii. State (Auto populate based on Postcode)
- xiii. Phone Number (Auto populate and not updatable)
- xiv. Alternate Phone Number
- xv. Email Address (Auto populate and not updatable)

0	Profile Details					
T		Personal Details				
8	Academic Gualifications	Name (As Per NRIC)	NORFADZILAH BI	NTI MOHD RADZI		
	Schumu Sulaction	NRIC No	9909090999005		Upload your ID	R Carlo
۲	Type of Registration	Race	Choose	Nationality	Malaysian	
۲	Screening	Date of Birth	09-SEP-1999	Age	25	3 Contraction
	Others	Gender	- Choose			
		Address				
		Postcode		City - Choos	ē	
		Stato	- Choose -			
		Phone Number	+60142656821	Alternate Phone Number		
		Email Address	tadzilahum@voom	ail com		

Figure 35: Profile Details section - Malaysian

b. Non – Malaysian

- i. Name (Automated Display Field)
- ii. Passport No (Auto populate and not updatable)
- iii. Race
- iv. Nationality (Automated Display Field)
- v. Passport Expiry Date (Automated Display Field)
- vi. Working Permit Expiry
- vii. Date of Birth
- viii. Age (System auto calculate based on DOB and current year, month, and date)
- ix. Gender
- x. Address
- xi. Postcode

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	42

- xii. City (Auto populate based on Postcode)
- xiii. State (Auto populate based on Postcode)
- xiv. Phone Number (Auto populate and not updatable)
- xv. Alternate Phone Number
- xvi. Email Address (Auto populate and not updatable)

		Personal Details				
	Academic Qualifications	Name (As Per NRIC)	JAMES LEE HAN			
3	Scheme Selection	Passport No	F98765432	Upic	oad your ID	0
ġ	Type of Registration	Race	- Choose -	Nationality	Non-Malaysian	9
	Screening	Passport Expiry	09-MAY-2029	Working Permit Expiry	DD	alt
	Others	Date of Birth	DDYYYYY 🗖	Age	0	
		Gender	- Choose -			
		Address				
		Postcode		City - Choose		
		State	- Choose -			
		Phone Number	+60142656621	Alternate Phone Number		

Figure 36: Profile Details section - non-Malaysian

23. For verification purposes, user need to upload their ID by clicking

24. System will display Upload ID page. User need to insert following items:

a. Malaysian

i. Front NRIC – coloured photo by following guidelines requirement.

Upload your ID

- ii. Back NRIC coloured photo by following guidelines requirement.
- iii. Selfie with NRIC while holding NRIC and do not cover your face.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	43

Upload	×
Upload Front NRIC* Choose File NO FILE CHOSEN	Click to enterge
Back NRIC* Choose File NO FILE CHOSEN	
Snap Selfie with NRIC [®]	
	Upload Cancel

Figure 37: Upload ID Display (Malaysian)

b. Non - Malaysian

- i. Passport Details
- ii. Working Permit
- iii. Selfie with Passport





Figure 38: Upload ID Display (Non - Malaysian)

25. Once user inserted all the items, the images will be display.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	45







Upload



Figure 40: Uploaded ID

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	46

27. The system will display a notification message.



Figure 41: Upload Images Message

- 28. Once user inserted following items, click
- 29. System will display **Academic Qualification section** and user must add minimum one qualification to proceed.

Next >>

۲	Profile Details	Academic Qualification	ins		
0	Academic Qualifications	Qualification Level	Choose	Add	
3	Scheme Selection				
۲	Type of Registration				
6	Screening				
۲	Others				
	est Phys			Pacial >	



Add

30. Chose Qualification Level and click



Figure 43: Qualification Level

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	47

- 31. If user choose SPM/SVM, the user needs to insert following items:
 - a. Year
 - b. School Name
 - c. Subjects Language and Mathematics are mandatory to be filled in.
 - For the first language group, you may fill in either one of the language:
 - BAHASA MELAYU
 - BAHASA INGGERIS
 - BAHASA CINA
 - BAHASA TAMIL
 - For the first mathematics group, you may fill in either one of the mathematics subjects:
 - MATEMATIK
 - MATEMATIK MODEN
 - MATEMATIK TAMBAHAN
 - BAHASA TAMIL
 - Should your result be lower than "C", please choose "NIL".
 - You may key in the rest of your other subjects.
 - d. Qualification Certificate Upload your relevant certificate.

ear* Choose		
chool Name*		
equires at least 3 oredits	+	Add Subject
SUBJECTS	SCORE	ACTIONS
BAHASA MELAYU	Choose	0
МАТЕМАТІК	Choose	0
Choose	Choose	0
Internation Conditionated C		

Figure 44: SPM/SVM Items Display

- 32. If user add STPM/STAM, the user needs to insert following items:
 - a. Graduation Year
 - b. School / College
 - c. Qualification Certificate

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	48
	STPM/STAM			6		
	Graduation Year*		Choose			
	School / College*					
	Qualification Cert	ificate*	1 Choose file to upload			

Figure 45: STPM/STAM Items Display

- 33. If user add Diploma, Degree, Master and PHD, the user needs to insert following items:
 - a. Graduation Year
 - b. College / University
 - c. Field of Study
 - d. Qualification Certificate

Graduation Year*	Choose
College / University*	
Field of Study*	
Qualification Certificate*	Choose file to upload

Figure 46: Diploma, Degree, Master, PHD Items Display



Graduation Year*	Choose
School / College*	
Qualification Certificate*	1. Choose file to upload

Figure 47: Button to Remove Qualification Level

Einana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	49

35. Click to view the uploaded qualification certificate or button to remove the uploaded qualification certificate.

▲ Choose file to upload	
Certificate.jpg	Click Icon

Figure 48: View Uploaded Certificate



37. System will display Scheme Selection section.

a. User need to choose following scheme by ticking the radio button. Only single scheme is allowed at this moment.

۲	Profile Dutaile	Scheme Selection			
2	Academic Gaalifications	Schama*	Unit Trust Scheme (UTS)	Private Retirement Scheme	
0	Scheme Selection	List of Distributor*	Chooss	. •	
۲	Type of Registration				
۲	Scraming				
۲	Others				
	- Prav				Not in

Figure 49: Scheme Selection section Form

b. User need to choose distributor from the dropdown List of Distributors. Please approach your preferred distributor for onboarding process prior registering in the system.

	Profile Details	Scheme Selection				
2	Academic Qualifications	Scheme*	Unit Trust Scheme (UTS)	O Private Retirer Scheme (PRS)	nent	
0	Scheme Selection	List of Distributor	- Choose -	•	0	
1	Type of Registration		_			
5	Screening		GAB PROD ADMIN MIX			
6	Others		Pinnacle Investment Sdn Bhd			
	«< Prav		NIPPON FINANCE SDN BHD			Next >>

Figure 50: UTS List of Distributors

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	50

c. If user choose Non – CUTA / CPRA Type of Distributor, there is no further action.

1	Profile Details	Scheme Selection				
2	Academic Qualifications	Scheme*	Unit Trust Scheme	Private Retiren Scheme (PRS)	nent	
3	Scheme Selection	List of Distributor	Prestasi Kewangan Sdn Bhd	•	0	
4	Type of Registration					
5	Screening					
6	Others					
	$\ll p_{\uparrow 0V}$					Next>>

Figure 51: Non – CUTA/CPRA Type of Distributor

d. If user choose CUTA / CPRA Type of Distributor, the system will display CMRSL Requirement. User needs to fill in the information.

Scheme Selection			
Scheme*	Unit Trust Scheme (UTS)	Private Retirement (PRS)	Scheme
List of Distributor*	HERITAGE WEALTH DISTRIBUTORS	•	0
CMSRL Requirement			
Do you have CMSRL*	O Yes	O No	

Figure 52: CMSRL Requirement Section

- e. If user choose Yes, user need to insert following items. (Note: If user is the first consultant to register under the distributor, the user must choose 'Yes' and provide the CMSRL No.)
 - i. CMSRL No.
 - ii. CMSRL Certificate
 - iii. Recruiter Name (To select from dropdown list)
 - iv. Recruiter CMSRL No. (Automatically display by choosing recruiter name)
 - v. Recruiter FIMM No. (Automatically display by choosing recruiter name)

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	51

)o you have CMSRL*	Yes	○ No	
CMSRL No.*		CMSRL Certificate*	1 Choose file to upload
Recruiter Name ^a	- Choose		•
Recruiter CMSRL No.*		Recruiter FIMM No.*	

Figure 53: CMSRL Requirement - Yes

- f. If user choose No, user need to insert following items:
 - i. Please get the details of the recruiters from your distributor.
 - ii. Recruiter Name (To select from dropdown list)
 - iii. Recruiter CMSRL No. (Automatically display by choosing recruiter name)
 - iv. Recruiter FIMM No. (Automatically display by choosing recruiter name)

o you have CMSRL*	Yes	No No	
tecruiter Name*	- Choose		*
tecruiter CMSRL No.*		Recruiter FIMM No.*	

Figure 54: CMSRL Requirement – No

- g. System will run checking whether user have previously enrolled in AP. If No AP found, then system will auto enrol the AP program for the consultant.
- 38. Click and system will display **Type of Registration section**. User need to select one from two options in the dropdown list:
 - a. Examination to take FIMM examination
 - b. Exemption if you qualified to exempted from the examination.

	Project	Reference		File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/	V0.1	User Manual Document	1.0	24/03/25	52
	1 Profile Details	m Booking Session					d
	2 Academic Qualifications Pleas	e select an option*	- Choose	8-			
	3 Scheme Selection		- Choose EXAMIN	≥ – ATION			
	Type of Registration		EXEMPT	10 N			
	5 Screening						
	6 Others						
	<4 FROM					Next >>	

Figure 55: Type of Registration section

39. If user selected Examination, system will display Center Location.

Exam booking Session		
Please select an option*	EXAMINATION	
Center Location	- Choose -	Please choose one

Figure 56: Center Location

40. After selecting the center location, system will display the calendar and exam session availability.

-inana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	53

SUN	MON	TUE	WED	THU	FRI	SAT
23	24	25	26	27	28	1
23	3	Avoilable: 300	5 Available: 300	6 Available: 300	7 Availebie: 300	8 Avaliable: 300
		*2 more	*2 more	+2 more	+2 more	+2 more
9	10	11	12	13	14	15
Available: 300	Aveilable: 300	Available: 300	Available: 300	Available: 300	Available 300	Available: 300
-2 more	+2 more	+2 mote	+2 more	+2 more	+2 more	+2 more
15	17	18	19	20	21	22
Session 0900 Availab	Session: 09.00, Aveila)	Session: 03.00, Aveilet	Session: 05.00, Availat	Session 09:00 Availab	Session: 09.00, Availab	Session: 03.00, Aveilet
-2 mara	+2 moré	+2 more	+2 more	-2 moro	+2 mara	+2 more
23	24	26	26	27	28	29
Available: 300	Available: 300	Available:300	Available: 300	Availabio: 300	Available 300	Available: 300
+2 mora	*2 more	*2 more	+2 more	+2 more	+2 more	+2 more
30	31	1	2	3	4	5
Available: 300 Session: 0900, Availat	Available:300 Session: 09:00, Availat					
Session 12:00, Availab	Sension: 12,00, Aveilab					
Session 1500, Availab	Session: 16.00, Availab					

Figure 57: Booking Location Calendar

- 41. User to choose three preferred exam session.
 - a. User unable to select multiple exam session on the same date. System will prompt message that user must select date differ from the previous date selection.



b. User can click any available session, Session: 09.00, Available, system will display the details of the exam session.

	Project	Reference	File	Version	Date	Page
restment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	54
		Exam Session	~			
			~			
		Date				
		28-APR-2025				
		Exam Centre				
		B - EXAM CEN	TRE (FOF			
		Exam Mode				
		ONLINE				
		Exam Name				
		FIMM Compute	rised Examination			
		Languange				
		English				
		Clo	ose + Add			
		Figure 59: Exa	m Session Details			
	+ Add					
42. Cli	ck and	l system will displa	y the booking details u	inder the	calendar.	
DATE	TIME CEN	TER	STATE	EXAM	LANGUAGE	ACTION

Figure 60: Booking Details

Note: User is advisable to choose three exam dates. This is booking dates and only will be confirmed once approved by your preferred distributor. (Subject to dates availability – first come first served basis).

Once you have chosen your 3 preferred exam dates, please proceed to step **48** and continue until you have completed the steps.

The following steps from 43 to 47 only for **Exemption process**.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	55

43. If user select **Exemption**, the system will display the Exemption Rules and Regulation.

Exemption rules and regulation	IS X
To be exempted, you must fulfil the re	equirement as
stipulated in Appendix 1-A and/or 1-B	of the FIMM's
Consolidated Rules.	
(https://www.fimm.com.my/regulation:	s/fimm-consolidated-
rules/)	
	Close

Figure 61: Exemption Rules and Regulations

44. Click close, system will display Exemption Type.

Exemption		
Please select an option*	EXEMPTION	
Exemption Type*	- Choose -	Please choose type

Figure 62: Exemption Types

45. User need to choose the Exemption Type from the dropdown list based on the scheme selected.



Figure 63: Exemption Type Lists

- 46. For Exemption Type,
 - a. If consultant applicant chooses CUTA/CPRA Type of Distributor but no CMSRL, only Exam Validity option will be available. As for former consultant,

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	56

only, Exam Validity and Re-Registration will be available for the user to choose from.

comption Type*			
comption Tupo			
xempuon type	- Choose		
	- Choose -	Please choose type	
	Re-Registration		

Figure 64: Exemption Type for Former Consultant with no CMSRL

- b. Exam Validity
 - i. If user previously registered with exam and status exam passed, user able to select this exemption.
 - ii. If passed, user able to proceed to next page. If failed, system will prompt message the user unable to proceed to the next page please select other exemption.

lease select an option"	EXEMPTION	
cemption Type*	Exam Validity	
Inel	igible for re-registration - exam validity. Please re-select y	our registration type
Inel	igible for re-registration - exam validity. Please re-select y	our registration type
inei	igible for re-registration - exam validity. Please re-select y	our registration type

Figure 65: Exam Validity - Error Message

- c. Re-Registration (Not applicable for new consultant)
 - i. If user deactivation date is within current year, then user can proceed.
 - ii. If deactivation date is not within current year, but within the 3 years and 16 CPD points is met in the previous calendar year, then user can proceed.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	57

- iii. If deactivation date is not within current year, but within the 3 years and user does not attain 16 CPD in the previous calendar year. System will check if user has acquired the balance of 16 CPD points in current year (CPD preceding year + CPD current year ≥ 16). If the condition met, then user can proceed.
- iv. If not within above requirement, then system will display error message as the requirement not met.

Please select an option*	EXEMPTION		
Exemption Type*	Re-Registration		
	Investive for more than 2 years! Disease estant average	insting to continue	
	Inactive for more than 3 years! Please select example.	ination to continue.	
	Inactive for more than 3 years! Please select example the select examp	ination to continue.	
	Inactive for more than 3 years! Please select example the select examp	ination to continue.	

Figure 66: Re - Registration Error Message

d. PRS Familiarization Program (Note: This option only will be available if user select PRS scheme. If the distributor type CPRA & no CMSRL, PRSFP will not be shown for selection.)

Type of PRSFP

- i. Active Unit Trust Consultant
 - 1) User need to input these fields.
 - a) PRSFP Certificate of Attendance and quiz result
 - 2) System checks at the backend whether applicant already become consultant under UTS scheme more than 3 years.
 - 3) If the above requirement is not met, system will display error message under the Type of PRSFP field.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	58

lease select an option*	EXEMPTION	
Exemption Type*	Private Retirement Scheme Familiarisation Program (PRSFP)	
ype Of PRSFP*	Active Unit Trust Consultant	
	You are not eligible for this exemption type, please choose other exemption type or examination to proceed with registration application.	

Figure 67: Active UTC - Error Message

ii. Insurance Agent

- 1) User need to input these fields:
 - a) PRSFP Certificate of Attendance and quiz result
 - b) Insurance Certificate
 - c) Insurance Joining Date
- 2) System will check the eligibility based on PRSFP parameter.
- 3) If the user experience ≥ 3 years, then user can proceed to next process.
- 4) If the above requirement is not met, system will display error message under the Insurance Joining Date field.

lease select an option*	EXEMPTION	
xemption Type*	Private Retirement Scheme Familiarisation Program (PR	SFP)
ype Of PRSFP*	Insurance Agent	
RSFP Certificate of attendance and quiz result	1 Choose file to upload	
isurance Certficate [*] \\ 0	L Choose file to upload	
surance Joining Date*	21-MAR-2025	
	You are not eligible for this exemption type, please choose othe exemption type or examination to proceed with registration appl	r lication

Figure 68: Insurance Agent - Error Message

- iii. **Staff of Takaful Broker** (Note: only available for consultant who register under company with CMSL). User need to input these fields:
 - 1) PRSFP Certificate of Attendance and quiz result
 - 2) Insurance Certificate
 - 3) Insurance Joining Date

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	59

Please select an option*	EXEMPTION	
Exemption Type*	Private Retirement Scheme Familiarisation Program (PRSFP)	
Type Of PRSFP*	Staff of Takaful Broker	
PRSFP Certificate of * Attendance and quiz result	2 Choose file to upload	
Insurance Certficate* 0	1 Choose file to upload	
nsurance Joining Date*	DDYYYY Ö	

Figure 69: Staff of Takaful Broker

47. After choosing Exemption Type, user need to proceed to input the field display according to the exemption types chosen.

Exemption		
Please select an option*	EXEMPTION	
Exemption Type*	Financial Planner (Certified)	
Professional Body*	Malaysian Financial Planners and Advisers Association (MFPAA)	
Professional Qualification*	Charartered Financial Consultant (ChFC)	
Proof Of Active Membership*	Choose file to upload	
ChFC Certificate*	L Choose file to upload	

Figure 70: Exemption Type – Financial Planner (Certified)

- 48. Click and system will display **Screening section**. (Note: No action to be done by consultant in this section)
 - a. CAS Screening
 - b. Bankruptcy Screening

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	60
1	Profile Details CAS S	creening Detail				
2	Academic Qualifications				_	
3	Scheme Selection	Liear	•			
	Bankru	ipt Status				
4	Type of Registration Status	-				
5	Screening					
6	Others					
					_	
_	≪< Prev				Next >>	
	Upload Supporting File Name Upload Signed Co Application Consent Per FRMC Conset Person	nisent Form m ¹ Choose File: NU	Choose File NO FILE CHOSEN AU			
	Declaration					
	Name(As Per NRIC)	MACHATIOSTIA BINTI AZME	l.			
	NRIC	950303323456		-		
	are true, curre 2. I declare and Consolidated 3. I declare and 4. J undertake an Commission b 5. I undertake to prescribed by 6. I clockere and to the process 7. I will timely an registration with	int and accurate; controm that i fuffi and will continue to ensure Rukes ("FCR"), controm that i meet the eligible requirements a agree to be bound by and comply with the delysis and any other replication and in the delysis and any other replication and is immediately notify the principal and/or FIM I fulfit, confirm that I have rund and anderstood FIM or personal date provided herein by I d fulfy pay eli hees and charges imposed by i th FIMM, and	I that I am I it and I Yoper, as specified under Chapter 4 of I IMB as specified under the I CR; I IMM Rules and securities laws issued by the Securities firms; I in the event that I hall to satisfy any of the fit and proper calcula Mis Privacy Notice available on its webnile, and I hendry canno IMM for the ourposes stated in the Physicy Notice; FIMM and undertake to do all things necessary for my continuan	та		
	 I uniterstand the p leformation. I affin 	gravity of the above statements and the impli- m that the statements made herein are true t	cations of non-compliance with FIMM's Rules and in providing i to the beat of my knowledge and belief.	talse		

Figure 72: Others section

50. Under the Upload Supporting Document, user can upload supporting document.

		Upload Supporting Document
		File Name
SEN Add	Choose File NO FILE CHOSEN	

Figure 73: Upload Supporting Document

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	61

- a. User need to insert file name and choose the file to upload and click
- b. Upon successful upload of the supporting document(s), system will display file details as below.

NO	FILE NAME	ATTACHMENT FILE	ACTION
1	SUPPORT DOCUMENT	FIMM SRS - M02S01 - Registration V1.0 [FINAL].pdf	00



c. If user did not insert file name, system will display an error message.



Figure 75: Error Message for Rename File Name

51. Under the Upload Signed Consent Form, user is mandatory to upload the Application Consent Form. The form for the Application Consent Form can be downloaded from the system.

Upload Signed Consent Form	
Application Consent Form*	Choose File NO FILE CHOSEN
FIMM-Consent-Form.pdf	

Figure 76: FIMM - Consent Form

52. To save the application as Draft, user click Save Draft to save the registration form.

a. System will display confirmation message.

Save as draf?		
	YES	NO



	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	62

b. User click **YES** and system will display successful message.

Successfully saved as draft!	
	ок

Figure 78: Successful Message

c. User click and system will redirect to the application status page. The application status is 'Draft'.

SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS	ACT
04-Mar-2025 02:36:09pm	MENTARI BERHAD	Registration	UTS	Driaft	



53. To submit the application,

a. User is required to tick the agreement / declaration checkbox and click



Figure 80: Declaration

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	63

b. System will prompt error message if user does not tick the agreement / declaration checkbox.

Please tick declaration	
	ок



c. System will display a confirmation message.

Confirm to proceed?		
	YES	NO

Figure 82: Confirmation Message

d. User click YES

and system will display submission message.

Registration Application Submitted!	
	ОК

Figure 83: Submitted Message

e. User will be redirect to Application Status Page. Application status change to 'Submitted'.

ow 10 v entries					Search:	
SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	0	SCHEME	¢ STATUS	AC:
04-Mar-2025 02:42:17pm	MENTARI BERHAD	Registration		UTS	Submitted	

Figure 84: Submit Application Status

Congratulation! You have successfully submitted your application.

Please wait your preferred distributor to review and approved your application.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	64

In the case your application being returned by distributor please follow this section.

G. Application Returned

1. In Application Status, under column Action, Consultant Applicant click button @at (Status: Returned)

10 Now	~	entries Search					
			DISTRIBUTOR NAME	APPLICATION TYPE	0 SCHEME	STATUS 0	ACTION
		21-Mar-2025 11:23-18am	GAB PROD ADMIN MIX	Registration	UTS	Returned	0

Figure 85: Application Status - Returned

- 2. System will display previously submitted application and consultant applicant can edit these fields in all previous section:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 3. Consultant applicant can view comment from distributor the reason for returning the application.

	Poly Poly day					
1	SCIENCING SERVICING	Passport No	F98765432	View	v file	
4	Type of Registration	Race	CHINESE	Nationality	Non-Malaysian	9
5.	Screening	Passport Expiry	09-MAY-2029	Working Permit Expiry	05-AUG-2032 🗖	and the
6	Othera	Date of Birth	12-JAN-1994	Age	31	~
		Gender	MALE			
		Address	NO. 15, JALAN KEBU	IN TEH		
		Postcode	80000	City JOHOR BAHF	łU	
		State	JOHOR			
		Phone Number	+60142656821	Alternate Phone Number		
		Email Addross	jamesleeum@yopmai	I com		
_						NSA **
etum	Comment	complete documents and	informations			

Figure 86: Return Comment from Distributor

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	65

4. Consultant applicant clicks

to re-submit the application.

- 5. System checking:
 - a. If the detail is incomplete:
 - i. System will display validation message if mandatory field is blank.
 - b. If the detail is complete:
 - i. System will display successful application message and send the application for Distributor action.



Figure 87: Successful Message

ii. System back to Application Status and Status change to 'Submitted'

Application Stat	US					
Show 10 🗸	entries				Search:	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME 0	STATUS 0	ACTION
	21-Mar-2025 11 36:30am	GAB PROD ADMIN MIX	Registration	UTS	Submitted	0

Figure 88: Application Status – Submitted

H. Reschedule Exam

- 1. If the exam booking session is unavailable. System will send email and dashboard notification for user to reschedule. System will update Application status to 'Exam Re-Schedule'.
- In Application Status, under column Action, Consultant Applicant click button
 Reschedule
 at application with status 'Exam Re-schedule' or 'Pending Examination'.

show 10	*	ontries				Search	
		SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	§ SCHEME	♦ STATUS ♦	ACTION
		21-Mar-2025 11 44-23am	GAB PROD ADMIN MIX	Registration	UTS	Periding	

Figure 89: Application Status - Pending Examination

3. System will navigate to Type of Registration page (Examination) and Consultant applicant to select only 1 preferred date for exam session.

		Project	Re	ference		File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)		ZANKO/	ZANKO/FIMM/UM/V0.1		User Manual Document	1.0	24/03/25	66
		Profile Details	Exam Bookin	g Session					
	2	Academic Qualifications	Please select an	option*	EXAMINATIO	2N			
	3	Scheme Selection	Center Location		ARCNET 1		•		
	0	Type of Registration	DATE	TIME	CENTER	STATE	EXAM	LANGUAGE	
	5	Screening	24-Mar-2025	15.00	ARCNET 1	Wilayah Persekutuan Kuala Lumpur	FCE	Malay	
	6	Othors							

Figure 90: Type of Registration page – Examination

4. System will prompt error message if user select more than one exam session.



Figure 91: Exam Session - Error Message

5. The new selected exam session will be displayed under the previously chosen exam session.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	67

2	Profile Details	Even Booking	Saccion					
ź	Academic Qualifications	Contraction of the	0000000					
		Please select an op	tion*	EXAMINATION				
0	Scheme Selection	Center Location		ARCNET 1			0	
	Type of Registration							
5	Screening	< >			March	2025		today
		SUN	MON	TUE	WED	THU	FRI	SAT
9	Others	23	24	25	26	27	28	1
		2	3	4	5	6	7	8
		9	10	11	12	13	14	15
		16	17	18	19	20	21	22
		23	24 Available:	25 299 Avpiloble: 30	26 Available 30	Z/ Ave1able:300	28 Avsilable: 300	29 Available: 300
		30 Available: 300	+3 more	+3 mare	+3 more	+3 more 3	+3 more	+3 more 5
		+3 more		+3 more	+3 mora	+3 more	+3 more	+2 more
		DATE	TIME	CENTER STA	те		EXAM LANG	UAGE ACTION
	, r	24-Mar-2025	15.00	ARCNET 1 Wile	yah Persekutuan Ku	ala Lumpur	FCE Malay	0
		DATE	тіме с	ENTER STAT	E	E	XAM LANGU	AGE ACTION
			0.007207 IV.1					

Figure 92: New Selected Exam Sessions

- 6. Consultant Applicant click button
 - a. System will display successful application message and book the exam session.

Registration Application Submitted!	
	ок

Figure 93: Successful Application Message

b. System will auto-register the exam seat without needing approval from distributor.

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	68

I. Exam Booked

1. In Application Status, under column action, user click button ^{Exam} (Status: Pending Examination)

how 10	✓ entries	entries Search				
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS	ACTION
	21-Mar-2025 12:45:02pm	GAB Kenanga SDN BHD	Registration	PRS	Pending Examination	0

Figure 94: Pending Examination

- 2. System will open a popup that will display exam details for the booked session.
 - a. Candidate Name
 - b. NRIC/Passport No
 - c. Exam Name
 - d. Session Date
 - e. Session Time
 - f. Exam No (User copy the exam number and pasted it during examination in Classmarker to login into the exam session)
 - g. Exam Link (User copy the links and paste it in a browser)

Candidste Name	
Balqis binti Amri	
NRIC/Passport	
950721076548	
Ехапт Капне	
FCE	
Session Date	
21-March-2025	
Session Time	
3 PM	
Exam No	
2025001885	
Exam Link	
https://www.classmarker.com/online-test/start/?quiz=a6m677b825adc85t8cm_user_id=2465	
Contract Water A	
Start Exam	

Figure 95: Exam Details

Start Exam

3. User can click button to start the exam. The system will navigate to the Classmarker exam session page. You may only be able to sit for the exam based on the provided date. The guidelines on how to sit for the exam can be found in your registered email before the exam date.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	69

J. For Exam Failed (Resit)

If you have sat for the examination and did not pass the examination, you may choose to Resit the exam. Otherwise, you may submit your appeal by clicking $\overrightarrow{\text{Potel Result}}$, please refer to section \mathbf{O} – Appeal for Exam Result which subjected to distributor and FIMM's approval (with additional cost).

In Application Status, under column Action, Consultant Applicant click button (Status: Exam Failed)

show 10 v	er 10 🗸 entries Searc					che
		DISTRIBUTOR NAME	APPLICATION TYPE	0 SCHEME	STATUS	ACTION 1
	13-Mar-2025	Prestasi Kewangan Sdn	Registration	UTS	Exam Failed	0000

Figure 96: Application Status - Exam Failed

- 2. If user choose to re-sit, it will be considered as a fresh application in the system.
- 3. System will display previously submitted application and consultant applicant can edit these fields in all previous section:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 4. During the scheme selection process for a re-sit application, user may switch to a different distributor from the previous sitting.

Submit

6. Consultant applicant clicks

to re-submit the application.

- 7. System checking:
 - a. If the detail is incomplete:
 - i. System will display validation message if mandatory field is blank.
 - b. If the detail is complete:
 - i. System will display successful application message and send the application for Distributor action.

01/
OK



ii. System back to Application Status and Status change to 'Submitted'

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	70

w 10 🗸	ontrios				Search:	
_	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS	ACTION
	19 Mar 2025 03:12:32pm	Pinnacio Investment Sdn Bhd	Registration	UTS	Submitted	•
_	19-Mar-2025 03:07:02pm	Prestasi Kewangan Sdn	Registration	UTS	Exam Failed	0



K. Apprentice Program (AP) Enrolment

- 1. If user chose CUTA/CPRA as distributor and user does not have a CMSRL, system will auto pre-enrol Apprenticeship program for the user.
- 2. For AP, each individual has only 1 chance to join. Once utilised, no future enrolment is allowed.
- 3. AP commencement date only takes effective once the application is approved by FIMM RD.
- Each AP can re-register to another CUTA/CPRA for one time only under AP within 3 months from their AP commencement date. Re-registration with the last joined CUTA/CPRA is prohibited.
- 5. If the AP resign / being terminated after 3 months from the AP commencement date, the AP cannot re-register under AP selection and uploading of CMSRL is mandatory, unless re-registration is made to non CUTA/CPRA.
- 6. Each AP must complete the CMSRL status before the AP Expiry Date. If no CMSRL is uploaded upon AP expiry date, the status of the AP consultant will be automatically terminated, unless extension is given.

L. Pending AP Enrolment

(Type of Registration – Examination and No CMSRL)

1. In Application Status, under column Action, Consultant Applicant click button (Status: Pending AP Enrolment)

pplication stat	tus					
10 v	entries				Search:	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME 0	STATUS 0	ACTION
	22-Feb-2025 10:07 41pm	GAB PROD ADMIN MIX	Registration	PRS	Pending AP Enrolmont	0

Figure 99: Pending AP Enrolment

- 2. Consultant applicant navigates to page Type of Registration page.
- 3. Under AP Attachment section, consultant applicant to select Professional Body and upload:

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	71

a. FPAM

- i. CFP / IFP
 - 1) Proof of Active Membership
 - 2) Module 1 Result Slip or Exemption Letter

AP Attachment			
Exemption Type	FINANCIAL PLANNER (ASS	SOCIATE)	
Professional Body	FINANCIAL PLANNING ASS	SOCIATION OF MALAYSIA	
Professional Qualification	Islamic Financial Planner (IF	'P)	
Proof of Active Membership	1 Choose file to upload		
	sample_file.pdf	0	
IFP Module 1 Result Slip/Exemption Letter	Choose file to upload		
	lesidata4.pdf	0	
			Next >>

Figure 100: Professional Body – FPAM

b. MFPC

- i. RFP / Shariah RFP
 - 1) Proof of Active Membership
 - 2) Module 1 Result Slip or Exemption Letter

Exemption Type	FINANCIAL PLANNER (ASSOCIATE)		
ofessional Body	MALAYSIAN FINANCIAL F		
ofessional Qualification	Shariah Registered Financ	al Planner (Shariah RFP)	
Proof of Active Membership	L Choose file to upload		
	sample_file.pdf	0	
ariah RFP Module 1 Result ip/Exemption Letter	1 Choose file to upload		
	testdata4.pdf	00	

Figure 101: Professional Body - MFPC

Submit

4. Consultant applicant clicks

to re-submit the application.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	72

5. System checking:

i.

- If the detail is incomplete:
 - a. System will display validation message if mandatory field is blank.
- ii. If the detail is complete:
 - a. System will display successful application message and send the application for Distributor action.

Registration Application Submitted!	
	ок



b. System back to Application Status and Status change to 'Submitted'.

M. Failed CAS Screening

1. In Application Status, under column Action, Consultant Applicant click button ⁽²⁾. (Status: Rejected / Submitted)

ihow 10 🗸	entries				Search:	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	6 SCHEME	0 STATUS 0	ACTION
	20-Feb-2025 05:38:47pm	Prestasi Kewangan Sdn Bhd	Registration	PRS	Submitted	0

Figure 103: Application Status – Submitted

- 2. System will display previously submitted application and consultant applicant:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 3. Under Screening section, Consultant Applicant can view failed CAS status. (Note: As the requirement for CAS module <u>will only affect consultant that has already</u> <u>registered with FIMM</u>, no action will be taken here as the status is still consultant applicant)
- 4. For non-conditional CAS tag, system will auto-reject the application and display message "You have been suspended/barred/blacklisted by FIMM. Kindly contact FIMM for further information".

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	73

5. For conditional CAS Status, consultant applicant can see remarks from LRA of the training need to attend to uplift the conditional status. (*No Action to be done here*).

Profile Details	1					
	CAS	Screening Detail				
Academic Qualifications	Status		Suspension - Sand	toned -		
Scheme Selection	Conditio	nal	🖲 Yes 🔘 No			
Type of Registration Conditional Remark						
Type of Registration	Conditio	nal Remark	Please attend one	(1) training program		
Type of Registration	Conditio	nal Remark	Please attend one	(1) fraining program		
Type of Registration Screening Others	Condition	DESCRIPTION OF AC	Please attend one	(1) training program START DATE	END DATE	FULFILMENT
Type of Registration Screening Others	NO 1	DESCRIPTION OF AC	Please attend one	(1) training program START DATE 22/FED/2025	END DATE 22/FEB/2025	FULFILMENT

Figure 104: Failed CAS Screening

N. Failed Bankruptcy Screening

1. In Application Status, under column Action, Consultant Applicant click button <a>. (Status: Submitted)

ow 10 👻	entries						Search:	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	0	SCHEME	0	STATUS 0	ACTION
	20-Feb-2025 05:38 47pm	Prestasi Kewangan Sdn Bbd	Registration		PRS		Submitted	0

Figure 105: Application Status – Submitted

- 2. System will display previously submitted application and consultant applicant:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 3. Under Screening section, Consultant Applicant can view failed Bankruptcy Status. (*No action to be done by consultant inside the system*).

	Project	R	eference	File	Version	Date	Pag
ment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANK	O/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	74
	1 Profile Details						
		CAS Scree	ening Detail				
	2 Academic Qualifications	Status	CH	and the second se			
	1	(7,000,000)	Citt	203			
	3 Scheme Selection	Destant					_
	4 Type of Registration	Dankrupt 3	alus				
	1	Status	Ba	nkrupt			
	5 Screening	Bulant					
	1	Release	Choose Fil	e NO FILE CHOSEN			
	6 Others						
	<< Prev					No	ext >>>

Figure 106: Failed Bankruptcy Screening
	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	75

O. Appeal for Exam Result

This section only applicable for applicant that has sat the exam and failed. Which subjected to distributor and FIMM's approval (with additional cost).



Figure 107: Appeal for Exam Result Process Flow

1. Click Application Status under the Consultant submenu.



Figure 108: Consultant Sub Menu

- 2. System will display consultant Application with column:
 - a. Submission Date
 - b. Distributor Name
 - c. Application Type
 - d. Status
 - e. Action

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	76

P. Appeal for Fee Waiver

Request Appeal Fee Waiver by Consultant Applicant

This section only applicable for applicant that unable to sit for the examination due to a valid reason. Which subjected to distributor and FIMM's approval (may incurred additional cost).



Figure 109: Appeal for Fee Waiver Process Flow

1. Click Application Status submenu under the Consultant menu.



Figure 110: Consultant Sub Menu

- 2. System will display consultant Application with column:
 - a. Submission Date
 - b. Distributor Name
 - c. Application Type
 - d. Status
 - e. Action

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	77

ow 10 v entries				Search:	
SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	© SCHEME	\$ STATUS	4 ACTION
5.Mar-2025.01:14:47pm	GAB PROD ADMIN MIX	Registration	PRS	Absent	Appeal Fee War



3. Click Appeal Fee Waiver

and system will display following details on the Appeal

Fee Waiver tab.

Profile DAppeal Les Waven		
Consultant Details		
Distributor Name	GAB PROD ADMIN MIX	
Candidata Name	Halm bin librs (H)	
NRIC/Passport No	94040404504	
Exam Details		
Exem No	zazskietom	
Exam Type	Computatized Pixale Relimment Scheme Framination	
Exam Result	Amerit	
Centre Nesse	ARCNET 1	
Session Date	05.45er.2025	
Seealon Time	3 00 pm	
Time Started	æ	
Time Finished		
Duration Taken Minutes	2	
Last Date to Appeal	26 Mar 2026	
Exam approval date from PDS (for testing):	05 Mar 2025	
Fee werver status expired date (for testing):	¥	
Appeal		
Grounds For Appeal*		
	TSIC characterist methodolog	
Upload Supporting Document"	2. Choose file to upload	
		BAX Side

Figure 112: Appeal for Fee Waiver Tab

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	78

- 4. User need to fill in the required fields:
 - a. Grounds For Appeal
 - b. Upload Supporting Document (Can upload multiple)
- 5. To submit the application, user click Submit
 - a. System will prompt confirmation message.

YES NO

Figure 113: Confirmation to Proceed Message:

- b. If user click
 - i. If the mandatory field has not been filled, system will prompt a warning message.

Please fill in the mandatory field	
	ок

Figure 114: Mandatory Field Required Message

ii. If the field has been filled in, system will prompt a success message.





	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	79

iii. Click **OK**, user will be redirect to Application Status Page.

w 10 - entries		Search:			
UBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	\$ STATUS	ACTION
4-Sep-2024 11 09:58am	GAD PRSP	Registration	PRS	Absent	0
7-Mar-2025 09.46:29am	GAD PRSP	Appeal Fee Waiver	PRS	Submitted	0



- c. If user click **NO**, system will close the message and stay at current page.
- 6. If user click Back , user will be redirect to the previous page(Application Status).

Q. Appeal Returned by Distributor

Follow the following steps if the appeal application Returned by Distributor

1. Click Application Status under the Consultant submenu.



Figure 117: Appeal Exam Result Sub Menu

 System will display previously submitted Appeal Fee Waiver application. (Status: Returned)

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	80

ow 10 🗸	- ontrics				Search:	
			APPLICATION TYPE	SCHEME S	STATUS	ACTION
	04-Feb-2025 03:50:30pm	GAB Kenanga SDN BHD	Registration	UTS	Absent	0
	05-Feb-2025 12:22:32pm	GAB Kenanga SDN BHD	Appeal Fee Waiver	UTS	Returned	0



- 3. Click 🕝 under Action column.
- 4. System will display previously submitted application and consultant applicant can edit necessary details:
 - a. Grounds For Appeal
 - b. Upload Supporting Document (Can upload multiple)
- 5. System will also display comment from Distributors.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	81

Consultant Details				
Distributor Name	GAB Kenanga SDN BHD			
Candidate Name	CONS ABSENT SYARUL 04			
NRIC/Passport No	981201125752			
Exam Details				
Exam No	2025001842			
Exam Type	FIMM Computerised Examination			
Exam Result	Absent			
Centre Name	ZUL - UNTUK TEST EXAM			
Session Date	04-Feb-2025			
Session Time	9:00 am			
Time Started	(*)			
Time Finished	1818			
Duration Taken Minutes	5 2 5			
Last Date to Appeal	25-Feb-2025			
Exam approval date from PDS (for testing):	04-Feb-2025			
Fee waiver status expired date (for testing):				
Appeal				
Grounds For Appeal'	submit from consultant			
	478 characters remaining			
Upload Supporting Document?	L Choose file to upload			
	1738729337_testdata1.pdf	00	1738729337_testdata2.pdf	00
	Exemption Cert pdf	00		
Comment				
Appeal Fee Waiver application returned	I due to incomplete documents			
934 characters remaining				

Figure 119: Distributor Comment

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	82

- Submit to re-submit the application. 6. Consultant clicks
 - a. System will prompt message "Confirm to proceed?".

	Submit Confirm to proceed?
	YES NO
. User cl	Figure 120: Confirmation Message
	Success! Appeal submitted!
	OK

Figure 121: Successful Message

ок , system back to Application Status and Status change to Click C. 'Submitted'.

Application	Stat	US					
Show 10	۷	entries				Search:	
			DISTRIBUTOR NAME	APPLICATION TYPE	\$ SCHEME \$	STATUS 0	ACTION
		04-Feb-2025 03:50:30pm	GAB Kenanga SDN BHD	Registration	UTS	Absent	0
		05-Feb-2025 12:22:32pm	GAB Kenanga SDN BHD	Appeal Fee Waiver	UTS	Submitted	0

Figure 122: Submitted Appeal Fee Waiver Application Status

- NO d. If user click , system will stay at current page.
 e. Once submitted please wait for distributor to review and approve the appeal.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	83

R. Profile Maintenance

This section only applicable for Group C (Active and newly approved consultant)



Figure 123: Consultant Update Profile Process Flow

1. Click Profile Management under the Consultant submenu.



Figure 124: Consultant Submenu

2. System will display the main page of consultant detail.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	84

1. Profile			
Name	SENROSE ALIA (W)		FIMM Virtual Card
NRIC / Passport No	D45675678	FIMM No	F02029109
FIMM Joined Date	04-MAR-2025		
2. Apprenticeshia Pr	ogramme		
2. Apprenticeshie Pr 3. Unit Trust Scheme	<u>ogramme</u> :		
2. Appronticeshie Pr 3. Unit Trust Scheme 4. Bringto References	ogiamme :		
2. Apprenticeshie Pr 3. Unit Trust Scheme 4. Private Retiremen	ogramme : : : Scheme		

Figure 125: Registration Info

3. User click tab 'Profile', system will display profile details.

D	Profile Details	Personal Deta	ails			
0	Academic Qualifications	Name (As Per NRIC)	SENROSE ALIA	(W)		P LA
0	Scheme Selection	Passport No.	D45675678	N	law Filo	
6	Type of Registration	Race	CHINESE .	Nationality	Non-Malays +	
0	Screening	Passport Expiry	17/06/2027	Working Permit Expiry	DD/MM/YYY	
0	Others	Date of Birth	19/02/1998	Age	27	Chime Flue N., EN
		Gender	FEMALE .			
		Address	TAMAN MAJU J	AYA		
		Postcode	30000	City	РОН •	
		State	PERAK .	Phone Number	+60142656821	
		Email Address	senrosaum@yo	pmail.com		

Figure 126: Profile Detail

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	85

- 4. Click , system will display submenu. System will display all action that can be done.
 - a. Apply (Hide if both schemes registered)
 - b. Update Profile (Hide if no distributor attached)
 - c. Appeal (Hide if not revoked / no declaration done)
 - d. Renewal (Hide if not renewal period / no declaration done)



Figure 127: Actions Menu

- 5. Click "Update Profile" and system will navigate to Update Profile process.
- 6. System will display the **Profile Details section**. User need to enter all desired details to be updated:

a. Malaysian

- i. Name (Not updateable by consultant)
- ii. NRIC (Not updateable)
- iii. Race (Not updateable)
- iv. Nationality (Not updateable)
- v. Date Of Birth (Not updateable)
- vi. Age (Not updateable)
- vii. Gender (Not updateable)
- viii. Address
- ix. Postcode
- x. City
- xi. State
- xii. Phone Number (Not updateable)
- xiii. Alt Phone Number
- xiv. Email Address (Not updateable)
- xv. Upload Photo

	Project	Reference	e l	File		Version	Date
Malaysia Fede	ration of Investment agers Malaysia (FIMM)	ZANKO/FIMM/UM	/V0.1	User Manual Do	cument	1.0	24/03/25
Profil	•						
0	Profile Datails	-					
	Academic Qualifications	Personal Det	aus				
	And a second second	Name (As Per NRIC)	AMRY BIN IKA	AAL (B)		0	
	Scheme Selection	NRIC No.	890505011121	Ve	ew file	8	
4	Type of Registration	Race	MALAY	 Nationality 	Maleysian +	-	1
6	Screening	Date of Birth	05/05/1989	Age	35		
	Others	Gender	MALE	•		Choose File N	L.EN
		Address	TAMAN INDAH	12			
		Postcode	30000	CRY	IPOH		
		State	PERAK	Phone Number	+60142656821		
				All Phone Number			
		Email Address	amryum@yop	nail.com			

Figure 128: Profile Update Section (Malaysian)

b. Non – Malaysian

- i. Name (Not updateable by consultant)
- ii. Passport No
- iii. Race (Not updateable by consultant)
- iv. Nationality (Not updateable by consultant)
- v. Passport Expiry Date
- vi. Working Permit Expiry Date
- vii. Date Of Birth (Not updateable)
- viii. Age (Not updateable)
- ix. Gender (Not updateable)
- x. Address
- xi. Postcode
- xii. City
- xiii. State
- xiv. Phone Number (Not updateable)
- xv. Alt Phone Number
- xvi. Email Address (Not updateable)
- xvii. Upload Photo

re Malaysia Fe. Ma	deration of Investment anagers Malaysia (FIMM	741/0		File			
Rugistration		ZANKO	FIMM/UM/V0.1	User Manual	Document	1.0	24/03/25
Profile	hido Prottis CPD						
0	Profile Details	Personal Details					
	Academic Qualifications	Name (As Per NRIC)	CALLIE ROSE (B)				AS
۲	Scheme Selection	Passport No.	H89011211	Up	load	2011	
(4)	Type of Registration	Race	CHINESE •	Nationality	Non-Malaysian	•	hill.
3	Screening	Passport Explig	15/07/2038	Working Pesmit Expiry	06/07/2030	•	
(6)	Others	Date of Birth	17/05/1999	Age	25	Choose The NO	D FILE CHOSEN
		Gender	FEMALE •				
		Address	TAMAN INDAH 4				
		Postoode	50000	City	KUALA LUMPUR		
		State	WLAYAH PERSERUTUAN	Phone Number	+60183056831		
		EmailAddress	calleum@yopmail.com				

Figure 129: Profile Details section (non-Malaysian)

7. Click and system will display **Academic Qualification section**.

- a. Qualification Level options:
 - i. SPM/SVM
 - ii. STPM/STAM
 - iii. Diploma
 - iv. Degree
 - v. Masters
 - vi. PhD
- b. User can add new academic qualification but cannot amend existing academic qualification.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	88

1	Profile Details	Academic Qualifications			
2	Academic Qualifications	Qualification Level	Choose -		Add
3	Scheme Selection	MASTER			
4	Type of Registration	Graduation Year		2015	
5	Screening	College/University		UKM	
	Others	Field of Study		COMPUTER SCIENCE	
	outers	Qualification Certificate		1 File 1	0
				Choose File NO FILE C	HOSEN

Figure 130: Update Qualification Section

8. Click and system will display **Scheme Selection section**. (No field to be updated here)

	List of Distributor	PRESTASI KEWANGAN	SDN BHD
Others		Scheme (UTS)	Retirement Scheme (PRS)
Screening	Scheme	Unit Trust	🔄 Private
Type of Registration	Scheme Selection		
Scheme Selection	Distribution Point	Sabah Branch 🔹	
Academic Qualifications	Registration Type	Tied Agent	Staff
Profile Details	Distribution Point		

Figure 131: Scheme Selection Section

- 9. Click and system will display **Type of Registration section**. (Note: User can only update for Module Completion under this section)
 - a. Examination

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	89

1	Profile Details	UTS		
2	Academic Qualifications	Registration Type	EXAMINATION	
3	Scheme Selection			
-	Tuna of Pagistration	Exam Detail		
~	Type of Registration	UTS		
5	Screening	Exam Result	PASS	
6	Others	Date	12 MAR 2025	
		Certificate	View	
	4			+

Figure 132: Type of Registration – Examination

1	Profile Details		
		PRS	
2	Academic Qualifications	Registration Type	EXEMPTION
3	Scheme Selection	Exemption Type	Financial Planner (Associate)
4	Type of Registration	Professional Body	Financial Planning Association of Malaysia
5	Screening	Professional Qualification	Islamic Financial Planner (IFP)
6	Others	Proof Of Active Membership	Choose File NO FILE CHOSEN
		IFP Module 1 Result Slip/Exemption Letter	Choose File NO FILE CHOSEN
		IFP Module 3 Result Slip	Choose File NO FILE CHOSEN

b. Exemption

Figure 133; Type of Registration Section – Exemption

- 10. User can update the Module Completion under AP Completion section at Type of Registration section (For AP consultant only, must complete before AP expiry date, else will be terminated). User need to input these fields:
 - a. Professional Qualification certificate (These fields depend on the Professional Qualification selected by user Pending AP Enrolment stage)
 - b. CMSRL No.
 - c. CMSRL Certificate

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	90
0						
AP	Completion					4
Islamic Certifica	Financial Planner (IFP)	hoose File NSEN)			
CMSRL	No]			
CMSRL	Certificate	hoose File NO SEN				



- 11. Click and system will display **Screening Section**: (No action to be done here)
 - a. Under Screening section,
 - i. Consultant can view failed CAS status. System will display an additional sub-section for CAS requirements, including remarks by LRA to inform the consultant of the requirements they need to fulfil.
 - ii. Consultant can view their bankruptcy status.

1	Profile Details	CAS Screenin	g Detail	
2	Academic Qualifications	Status	Clear 👻	
3	Scheme Selection	Beaks ust Stat		
4	Type of Registration	Status	Clear	
5	Screening		UICOL	
6	Others			

Figure 135: Screening Section

12. Click and system will display **Others section**.

- a. Upload Supporting Document
 - i. User need to insert file name and choose the file to upload and click



 Upon successful upload of the supporting document(s), system will display file details as below.

Federation of Investment Managers Malaysia (FIMM) ZANKO/FIMM/UM/V0.1 User Manual Document 1.0 24/03/25 91	risasa	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	91

NO	FILE NAME	ATTACHMENT FILE	ACTION
1	SUPPORT DOCUMENT	FIMM SRS - M02S01 - Registration V1.0 [FINAL].pdf	00

Figure 136: Support Document Details

iii. If user did not insert file name, system will display an error message.



Figure 137: Error Message for Rename File Name

- b. Upload Signed Consent Form (No update to be done here)
- c. Declaration

	Uplend Sa	oporting Docu	mont	
Ausdesity Qualifications	File Name			
Scherne Belectber			Choose File 1	O FL. HOSEN
Type of Registration	90	DARE	PLE NAME	ACTION
According	4	18 Mar 2025	DS 1	
Others	3	05-84-89-2025	08.2	/ View
	Upload Se	pred Garseel i	Farm	
	Application Con Finite Concard F	and Farm arm (d)	Characterize NO FILE CHOSEN	
	NO 1	DATE	PLU MAR	ACTION
	4 4	5-Mar-2025	FIMM-Convent-Form pt1	Mow
	Declaratio	n		
	NamejAs Par	NRICI	MRY BIN ROMAL (B)	
	MIRIC		80505011121	
	IMPORTAN ACRIVIAL APPLICATI I, the under Pederation 1, i deo profit 2, i deo undo 3, i deo 3, i deo 3, i deo 3, i deo 4, i undo	T NOTES, PLEA EDDING THAT Y ON. Ignet registered finestment Mo are and confirm are and confirm r Chapter 4 of Fil are and confirm of the and agree	SE SCROLL DOWN AND READ ALL DECL DUI AGREED TO THE TERME AND COND I Unit Trust ractor Photo Retinement Scien mages Multiplia (FIMA), hereby all mit hall a triomation and observers provided and of registration are true, current and accu- tant i nut an externation and observers that i a Mithy Consolitation Reas (FICP); fital Least the eligible requiraments as spec- to be bound by and compary with the FIMM	ARATIONS BEFORE (ITIONS OF THIS re Consistent with the e following: or FRM in connection with my raw, an FE and Proper, as specified lifed under the FCR, Rules and securities jaws.

Figure 138: Update Others Section

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	92

13. To submit the application,

a. User must read the declaration form and is required to tick the agreement / declaration checkbox.

ACK	NOWLEDGING THAT YOU AGREED TO THE TERMS AND CONDITIONS OF THIS
APP	LICATION.
, the	undersigned registered Unit Trust and/or Private Retirement Scheme Consultant with the
ede	eration of Investment Managers Malaysia ("FIMM"), hereby affirm the following:
1	. I declare and confirm that all information and documents provided to FIMM in connection with
	my profile update(s)/renewal of registration are true, current and accurate;
2	2. I declare and confirm that I fulfil and will continue to ensure that I am Fit and Proper, as
	specified under Chapter 4 of FIMM's Consolidated Rules ("FCR");
~	3. I declare and confirm that I meet the eligible requirements as specified under the FCR;
4	. I undertake and agree to be bound by and comply with the FIMM Rules and securities laws
11	nderstand the gravity of the above statements and the implications of non-compliance with FIMM's
R	les and in providing false information. I affirm that the statements made herein are true to the best of
m	y knowledge and belief.

Figure 139: Update Profile Application - Declaration

b. User click Submit

, system will check:

- i. If the detail is incomplete,
 - 1) System will display validation message if the mandatory field is blank.
- ii. If the detail is complete,
 - 1) System will prompt confirmation message "Confirm to proceed?"

confirm to proceed?		
	YES	NO

Figure 140: Confirmation Message

2) Click , system will display successful application message and send the application to the Distributor.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	93
		Update profi	le request Submitted!			
				C	к	
		Eiguro 1/1: Si	ubmitted Massage			
		Figure 141. St	IDITITIE INESSAYE			

3) Click ok , system back to Application Status and Status change to 'Submitted'.

Show 10 ~ entries					Search:		
SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	0	SCHEME	0 STATUS	0	ACTIO
05-Mar-2025 08:38 14am	Prestasi Kewangan Sdn Bhd	Registration		PRS	Approved		0
05-Mar-2025 09:27:07am	Prestasi Kewangan Sdn Bhd	Profile Update			Submitted		0

Figure 142: Submitted Update Profile Application Status

S. Returned Profile Update

1. In Application Status, under column Action, Consultant click button *at Profile* Update application. (Status: Returned)

Show	10 ¥	entries				Search:	
		SUBMISSION DATE		APPLICATION TYPE	♦ SCHEME ♦	STATUS 0	ACTION
		22 Mar 2026 12:08:48pm	Prestasi Kewangan Sdh Bhd	Registration	PRS	Approved	0
		22-Mar-2025 03:50:53pm	Prestasi Kewangan Sdn	Profile Update		Returned	0

Figure 143: Update Profile Application Status - Returned

- 2. System will display previously submitted application and consultant can edit these fields in all previous section:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	94

3. Consultant can view comment from distributor the reason for returning the application.

	File Name							
Scheme Selection				Choose File	NO FILE CHOSEN	Ada		
Type of Registration	NO	DATE		FILE NAME	ACTI	ON		
Screening	1	22-Mar-20	125	Attachment 1	Vie			
Others	Uplead Signed Consent Form							
	Application	Consent Form		Choose File NO FILE CHOSEN				
	FIMM-Conse	nt-Faan pdf						
	NO	DATE		FILE NAME		ACTION		
	1	22-Mar-2025		FIMM-Concent-Form.pdf		View		
	Declara	ation						
	Name(As I	Per NRIC)	NORFA	DZILAH BINTI MOHD RADZI				
	NDIC		0000000					
	MR.C.		9909091	129005				
	4.11	undertake and agre ommission Malaysi	ee to be bound a and any othe	by and comply with the Finan Rules an er applicable laws at all times;	o securnies iaws issued by	ine securities		
	5.11	undertake to immed	diately notify th	e principal and/or FIMM in the event that	It I fail to satisfy any of the	fit and proper criteria		
	6.10	declare and confirm onsent to the proce	n that I have re issing of my pe	ad and understood FIMM's Privacy Noti isonal data provided herein by FIMM fo	ce available on its website r the purposes stated in thi	and I hereby Privacy Notice;		
	7.1.	will timely and fully ontinuing registratio	pay all fees an on with FiMM,	d charges imposed by FIMM and under	take to do all things neces	sary for my		
	8.16 lin S(expressly consent a nited to, credit infor purce deemed appr nall remain in effect	and authorise t rmation, acade roptiate and re t during the per	the principal and FIMM to obtain and/or mic and professional qualifications, from asonable for the purposes of this applica- tiod of any registration with FIMM as a c	disclose any information, in n and/or to a Credit Report ation for registration with Fi onsultant.	icluding but not ing Agency or any MM. This consent		
	🖂 l unda	arstand the gravity	of the above s	tatements and the implications of non-c	ompliance with FIMM's Rul knowledge and belief	+		
					and the second second			
4								
m Commant	Lindata Daubic A	antination Plat	d due to use	desumable unleaded. Disease				
in comment.	Opdate Profile A	Marcanon Returnet	a ane to wroug	oocumena upioaued. Pieaae ensule tr	re uvcuments uploades is (Arrest before submission.		

Figure 144: Return Comment from Distributor

- 4. Consultant tick the agreement / declaration box and clicks to re-submit the application.
- 5. System checking:
 - a. If the detail is incomplete:
 - i. System will display validation message if mandatory field is blank.
 - b. If the detail is complete:
 - i. System will prompt confirmation message "Confirm to proceed?"

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	95

Confirm to proceed?		
	YES	NO

Figure 145: Confirmation Message

ii. Click , system will display successful application message and send the application to the Distributor.

✓	
Update profile request Submitted!	
	OK

Figure 146: Submitted Message

c. Click oK , system back to Application Status and Status change to 'Submitted'.

10	ontries				Search:	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS 0	ACTION
	22-Max-2025 12:08:48pm	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	0
	22-Mar-2025 03:50:53pm	Prestasi Kewangan Sdn	Profile Update		Submitted	0

Figure 147: Submitted Update Profile Application Status

T. Failed Bankruptcy Screening (Profile Update)

1. In Application Status, under column Action, Consultant click button <a>o at Update Profile application. (Status: Submitted)

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	96

Show	10	۷	entries				Search:	
			SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS	ACTION
			11-Mar-2025 03-50-59pm	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	0
			22 Mar 2025 04:48:24pm	Prestasi Kewangan Sdn Bhd	Profile Update		Submitted	0
			11-Mar-2025 03:52:09pm	Prestasi Kewangan Sdn	Consultant Variation	UTS	Approved	0

Figure 148: Application Status – Submitted

- 2. System will display previously submitted application and consultant:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 3. Under Screening section, Consultant can view failed Bankruptcy Status.

1	Profile Details	1		
		CAS Screening Detail		
2	Academic Qualifications	Status	Clear	
3	Scheme Selection			
1	Territoria de	Bankrupt Status		
Ŷ.	type of Registration	Status	Bankrupt	
9	Screening	Bankrupt Release Letter	Choose File N., SEN	0
6	Others			
	4			•

Figure 149: Failed Bankruptcy Screening

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	97

U. Variation of Registration

Apply Variation Of Registration by Consultant

This section only applicable for Group C (Active and new approved consultant)



Figure 150: Variation of Registration Process Flow

1. Click on Consultant Menu and Profile Management submenu.



Figure 151: Submenu for Variation Registration

- 2. System will display the main page of consultant detail divided into these tabs as follows:
 - a. Registration Info
 - b. Profile
 - c. CPD

risasa	Project	Reference	Fil	e	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual	Document	1.0	24/03/25	98
	Registration Info	CPD					
	<u>1. Profile</u>						
	Name NRIC / Passport No	SENROSE ALIA (W)	FIMM No	FIMIN No Engagero			
	FIMM Joined Date	04MAR-2025		101023100			
	2. Apprenticeshie Pr	ogramme					
	3. Unit Trust Scheme	ſ.					
	4. Private Retirement Scheme						
	Distributor Name	PRESTASI KEWANGAN SDN BHD					
	Distributor Joined Date	04.MAR-2025					
	Registration Status	ACTIVE					

Figure 152: Registration Info

3. User click 'Profile' tab. Under 'Profile' tab, system will display profile details.

D	Profile Details	Personal Deta	ils			
0	Academic Qualifications	Name (As Per NRIC)	SENROSE ALM	A (W)		MAC
0	Scheme Selection	Passport No.	D45675678	N	law Filo	
0	Type of Registration	Race	CHINESE	Nationality	Non-Malays +	
0	Screening	Passport Expiry	17/06/2027	Working Permit Expiry	DD/MM/YYY	
0	Others	Date of Birth	19/02/1996	Age	27	Contente File N. EN
		Gender	FEMALE .	•		
		Address	TAMAN MAJU	AYA		
		Fortunda		-	-	
		Poscode	30000	City	POH +	
		State	PERAK •	Phone Number	+60142656821	
		Email Address	senroseum@yo	pmail.com		

Figure 153: Profile Detail

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	99

4. Click

=

, system will display all action that can be done:

- a. Apply (Hide if both schemes registered)
- b. Update Profile (Hide if no distributor attached)
- c. Appeal (Hide if not revoked / no declaration done)
- d. Renewal (Hide if not renewal period / no declaration done)



Figure 154: Submenu Variation Registration

5. Click Apply and system will display a message.



Figure 156: Application Successful Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	100

7. Click 'OK', user will be redirect to variation registration process. The first section is the **Profile Details section**. (No changes can be made in this section)

0	Profile Details	Personal Details				
2	Academic Qualifications	Name (As Per NRIC)	SENROSE ALIA	W)		
۲	Scheme Selection	Passport No	D45675678	v	ficw file	Carlos -
۲	Type of Registration	Race	CHINESE	Nationality	Non-Malaysian	
۲	Ocreening	Passport Expiry	17/06/2027	Working Permit Expiry	20/10/2027	
۲	Othern	Date of Birth	19/02/1998	Age	27	
		Gender	FEMALE			
		Address	TAMAN MAJU JA	YA		
		Postcode	30000	City IPOH		
		State	PERAK			
		Phone Number	+60142656821	Alternate Phone Number		
		Ensail Address	senroseum@yop	mail.com		
						Next >>-
						Sawe Death

Figure 157: Profile Details section (Malaysian)

	Project		Reference		File		Version	Date	
anagers Malaysia	Federation of Invest Managers Malaysia	ment ZAN (FIMM)	KO/FIMM/UM/V0.1	L	lser Manual Do	ocument	1.0	24/03/25	
imm	Consultant Management	Consultant Variation							
0	Profile Details	Personal Details							
2	Academic Qualifications	Nome (As Per NRIC)	CALLIE ROSE (B)						
3	Scheme Selection	Passport No	H89011211		Viet	v file			-
4	Type of Registration	Race	CHINESE	Nationa	lity	Non-Malaysian			ALC: N
5	Screening	Passport Expiry	15-JUL-2030	Working	g Permit Expiry	08-JUL-2030	4		1
6	Others	Date of Birth	17-JUN-1999	Age		25			_
		Gender	FEMALE						
		Address	TAMAN INDAH 4						
		Postcode	20000	City	10 MI ALIMP	10			
		State	WILAYAH PERSEKU	ITUAN KUA	LA LUMPUR	UK			
		Phone Number	+60142656821	Alterna	e Phone Number				
		Email Address	callie um@yopmail.co	m					

Figure 158: Profile Details section (non-Malaysian)

8. User click Next>> . The system will display Academic Qualification section. (No changes can be made here)

risasa	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	102

	Academic Qualifications		
Academic Qualifications	Qualification Level - Choose -		Add
Scheme Selection	DIPLOMA		
Type of Registration	Graduation Year	2018	
Screening	College / University	UKM	
	Field of Study	COMPUTER SCIENCE	
Others	Qualification () Certificate	Cert Edu Diploma.pdf	0
		Verified	
			_

Figure 159: Academic Qualification section

- Next >> . System will display Scheme Selection section.
- a. User need to choose the available scheme.

9.

Click

b. User need to choose distributor from the dropdown List of Distributors.

	Profile Details	Scheme Selection				
2	Academic Qualifications	Scheme*	Onit Trust Scheme (UTS)	Private Retirem Scheme (PRS)	ent	
0	Scheme Selection	List of Distributor*	- Choose		0	
	Type of Registration		1			
5	Screening		- Choose			
6	Others		GAB PROD ADMIN MIX Plinnacle Investment Sdn Bhd			
	<-> Prav.		Prestasi Kewangan Sdn Bhd			Next >>

Figure 160: List of Distributors

c. If user choose Non – CUTA / CPRA Type of Distributor, there is no further action.

rinana	Project		Reference	•	File		Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investm Managers Malaysia (F	ent FIMM)	ZANKO/FIMM/UM/	/V0.1	User Manual Docume	nt	1.0	24/03/25	103
1	Profile Details								4
		Schem	e Selection						
2	Acadomic Qualifications	Scheme*		🔵 Uni	t Trust Scheme (UTS) OPrivat Schem	e Retirement 1e (PRS)			
3	Scheme Selection								
		List of Dist	ributor	Prestasi k	ewangan Sdn Bhd	• •			
4	Type of Registration								
5	Screening								
6	Others								
	= < Phys							Next>>	

Figure 161: Non – CUTA/CPRA Type of Distributor

d. If user choose CUTA / CPRA Type of Distributor, the system will display CMRSL Requirement.

Scheme Selection			
Scheme*	Unit Trust Scheme (UTS)	Private Retirement Sch (PRS)	neme
List of Distributor*	HERITAGE WEALTH DISTRIBUTORS	• 0	
CMSRL Requirement			
Do you have CMSRL*	O Yes	O No	

Figure 162: CMSRL Requirement Section

- i. If user choose Yes, user need to insert following items.
 - 1) CMSRL No.
 - 2) CMSRL Certificate
 - 3) Recruiter Name (To select from dropdown list)
 - 4) Recruiter CMSRL No. (Automatically display by choosing recruiter name)
 - 5) Recruiter FIMM No. (Automatically display by choosing recruiter name)

Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	104

)o you have CMSRL*	Yes	○ No	
CMSRL No.*		CMSRL Certificate*	pload
Recruiter Name*	- Choose		•
Recruiter CMSRL No.*		Recruiter FIMM No.*	

Figure 163: CMSRL Requirement - Yes

- ii. If user choose No, user need to insert following items:
 - 1) Recruiter Name (To select from dropdown list)
 - 2) Recruiter CMSRL No. (Automatically display by choosing recruiter name)
 - 3) Recruiter FIMM No. (Automatically display by choosing recruiter name)

	0	0	
Do you have CMSRL*	⊖ Yes	No	
Recruiter Name*	- Choose		*
Recruiter CMSRL No.*		Recruiter FIMM No.*	

Figure 164: CMSRL Requirement – No

iii. System will run checking whether user have previously enrolled in AP. If No AP found, then system will auto enrol the AP program for the consultant.

Next >>

. System will display **Type of Registration section**. User need 10. User click to select one from two options:

- a. Examination
- b. Exemption

	Project	Refer	ence	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMI	M) ZANKO/FIM	M/UM/V0.1	User Manual Document	1.0	24/03/25	105
	1 Profile Details	Exam Booking Session	G.				
	2 Academic Gualifications	Please select an option"	Choose				1
	3 Scheme Selection		- Choose EXAMINA	NTION			
	Type of Registration		EXEMPT	ION			
	5 Screening						
	6 Others						
	*< Pupy					Next >>	

Figure 165: Type of Registration section

11. If user selected Examination, system will display Center Location.

Exam Booking Session			
Please select an option*	EXAMINATION		
Center Location	Choose	Please choose one	0

Figure 166: Center Location

12. After selecting the center location, system will display the calendar and availability.

SUN	MON	TUE	WED	THU	FRI	SAT
23	24	25	26	27	28	1
2	3	Avoilable: 300 Section: 09.00, Availat	5 Available: 300 Section: DR 00, availat	6 Available: 300 Secon: 0900, Availab	7 Available: 300 Secon: 09.00, Availat	ð Avelfable: 300 Session: Ofi DD, Availat
9 Available: 300 Session: 0900, Availat	10 Available: 300 Sessor: 09.00, Availat	11 Available: 300 Seesion: 09.00, Availat	-12 Available: 300 Session: 09.00, Availat	13 Available: 300 Sessor: 09.00, Availab	14 Available: 300 Session: 0900, Availab	15 Avsilable: 300 Seeson: 09.00, Avsilat
-2 mor#	+2 more	+2 more	-2 more	+2 more	•2 more	+2 more
16 Available: 300 Session: 09.00, Availat -2 more	57 Available: 300 Session: 09.00, Availa) +2 morá	18 Available: 300 Session: 03.00, Availat +2 more	19 Available: 300 Session: 05.00, Availat +2 mole	20 Availabik: 300 Session: 09:00, Availist -2 more	21 Available: 300 Session: 09:00, Availet -2 more	22 Available: 300 Session: 05.00, Aveilab +2 more
23 Available: 300 Session: 09:00, Availat	24 Avails ble: 300 Section: 09.00, Availal	25 Available: 300 Session: 09.00, Availat	26 Available: 300 Session: 09:00 Availat	27 Available: 300 Session: 09.00, Availab	28 Available: 300 Session: 03.00, Availat	29 Ausliable: 300 Seulor: 09.00, Aveilat
+2 mora 30 Available: 300 Section: 0900, Availab Session: 12.00, Availab	+2 more 31 Avelia ble: 300 Sector: 09.00, Avellat Sessior: 12,00, Avellab	-2 milee	+2 more 2	+2 more	+2 more 4	+2 more
Session 1500, Availab	Seusion: 16.00, Augilab					

Figure 167: Booking Location Calendar

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	106

13. User to choose three preferred exam session.

a. User unable to select multiple exam session on the same date. System will prompt message that user must select date differ from the previous date selection.

Ensure at least a	3-day gap betw	een exams.	
			ок

Figure 168: Popup Message

b. User can click any available session, Session: 09.00, Availab, system will display the details of the exam session.

28-APR-2025	
Exam Centre	
B - EXAM CENTRE (FOF	
Exam Mode	
ONLINE	
Exam Name	
FIMM Computerised Examin	nation
Languange	
English	

Figure 169: Exam Session Details

14. Click

+ Add

and system will display the booking details under the calendar.

risasa	Project Federation of Investment Managers Malaysia (FIMM)		Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia			i of Investment ZANKO/FIMM/UM/V0.1 User Manual Document		1.0	24/03/25	107
DATE	TIME	CENTER		STATE	EXAM	LANGUAGE	ACTION
28-Ap	-2025 09.00	B-EXAN	CENTRE (FOR M02)	Wilayah Persekutuan Kuala Lumpur	FCE	English	Û

Figure 170: Booking Details

15. If user select Exemption, the system will display the Exemption Rules and Regulation.



Figure 171: Exemption Rules and Regulations

16. Click	ose , syste	em will display Exemption Type.	
Exemption			
Please select an opt	lion*	EXEMPTION	
Exemption Type*		Choose	Please choose type

Figure 172: Exemption Types

17. User need to choose the Exemption Type from the list.

risasa	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	108

Choose
Financial Planner (Associate)
Financial Planner (Certified)
CMSRL (Fund Manager)
Chief Executive Officer (CEO)
Director Of Distributor (DoD)
Exam Validity

Figure 173: Exemption Type Lists

54. For Exemption Type,

a. If consultant chooses CUTA/CPRA Type of Distributor but no CMSRL, only Exam Validity option will be available. As for former consultant, only, Exam Validity and Re-Registration will be available for the user to choose from.

ise select an option*	EXEMPTION	
emption Type*	- Choose	Please choose type
	- Choose -	
	Re-Registration	
	Exam Validity	

Figure 174: Exemption Type for Former Consultant with no CMSRL

- b. Exam Validity
 - i. System will check whether user has existing passed exam record.
 - ii. If user previously registered with exam and status exam passed, user able to select this exemption and proceed to next page.
 - iii. If failed, system will prompt message the user unable to proceed to the next page please select other exemption.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	109
	Exemption					
	Please select an option*	EXEMPTION				
	Exemption Type*	Exam Validity				
(Ineligible	e for re-registration - exam vali	dity. Please re-select your registration type	,		
				1	Next >>	

Diagram 3.7.29: Exam Validity - Error Message

- c. Re-Registration
 - i. If user deactivation date is within current year, then user can proceed.
 - ii. If deactivation date is not within current year, but within the 3 years and 16 CPD points is met in the previous calendar year, then user can proceed.
 - iii. If deactivation date is not within current year, but within the 3 years and user does not attain 16 CPD in the previous calendar year. System will check if user has acquired the balance of 16 CPD points in current year (CPD preceding year + CPD current year ≥ 16). If the condition met, then user can proceed.
 - iv. If not within above requirement, then system will display error message as the requirement not met.

lease select an option*	EXEMPTION		
xemption Type*	Re-Registration	Ĩ	
	Inactive for more than 3 years! Please select ex	amination to continue.	
	Inactive for more than 3 years! Please select ex	amination to continue.	
	Inactive for more than 3 years! Please select ex	amination to continue.	

Figure 175: Re - Registration Error Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	110

d. PRS Familiarization Program (Note: This option only will be available if user select PRS scheme)

Type of PRSFP

- i. Active Unit Trust Consultant
 - 1) User need to input these fields.
 - a) PRSFP Certificate of Attendance and quiz result
 - 2) System checks at the backend whether applicant already become consultant under UTS scheme more than 3 years.
 - 3) If the above requirement is not met, system will display error message under the Type of PRSFP field.

Please select an option*	EXEMPTION	
xemption Type*	Private Retirement Scheme Familiarisation Program (PRSFP)	
ype Of PRSFP*	Active Unit Trust Consultant	
	You are not eligible for this exemption type, please choose other exemption type or examination to proceed with registration application.	

Figure 176: Active UTC - Error Message

ii. Insurance Agent

- 1) User need to input these fields:
 - b) PRSFP Certificate of Attendance and quiz result
 - c) Insurance Certificate
 - d) Insurance Joining Date
- 2) System will check the eligibility based on PRSFP parameter.
- 3) If the user experience ≥ 3 years, then user can proceed to next process.
- 4) If the above requirement is not met, system will display error message under the Insurance Joining Date field.
| | Project | Reference | File | Version | Date | Page |
|--|--|--------------------|----------------------|---------|----------|------|
| Federation of Investment Managers Malaysia | Federation of Investment
Managers Malaysia (FIMM) | ZANKO/FIMM/UM/V0.1 | User Manual Document | 1.0 | 24/03/25 | 111 |

ease select an option*	EXEMPTION	
xemption Type*	Private Retirement Scheme Familiarisation Program (PRS	SFP)
pe Of PRSFP*	Insurance Agent	
RSFP Certificate of ttendance and quiz result	1 Choose file to uplead	
surance Certficate [*] ()	L Choose the to upload	
surance Joining Date*	21-MAR-2025	
	You are not eligible for this exemption type, please choose other exemption type or examination to proceed with registration appli	r Ication.

Figure 177: Insurance Agent - Error Message

- iii. Staff of Takaful Broker (Note: only available for consultant who register under company with CMSL). User need to input these fields:
 - 1) PRSFP Certificate of Attendance and quiz result
 - 2) Insurance Certificate
 - 3) Insurance Joining Date

Please select an option*	EXEMPTION	
Exemption Type*	Private Retirement Scheme Familiarisation Program (PRSFP)	
Type Of PRSFP*	Staff of Takaful Broker	
PRSFP Certificate of * Attendance and quiz result	Choose file to upload	
nsurance Certficate* 9	Choose file to upload	
nsurance Joining Date*	DDYYYYY	

Figure 178: Staff of Takaful Broker

18. After choosing Exemption Type, user need to proceed to insert the field display according to the exemption types chosen.

Projec	ct	Reference	File	Version	Date	Pag
Federation of Invest Managers Malaysia	stment a (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	112
Exemption						
Please select an option*		EXEMPTION				
Exemption Type*		Financial Planner (Certi	fied)			
Professional Body*		Malaysian Financial Pla	nners and Advisers Association (MFP)	λA)		
Professional Qualification	on*	Charactered Financial C	onsultant (ChFC)			
Proof Of Active Members	ship*	2 Choose file to upload				
ChFC Certificate*		L Cheose file to upload)			
Click Next >> this section) a. CAS S	F and sy creenin	igure 179: Example o /stem will display g - (Clear/whitelis	f Full Exemption Form Screening section t/Under	. (No actior	n to be do	one in
Click Next >> this section) a. CAS S Investi – Sanc b. Bankru	F and sy creenin gation/V ctioned/I uptcy Sc	igure 179: Example o ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) preening - (Clear/E	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No actior Investigatio	n to be do on/Suspe	ne in nsion
Click this section) a. CAS S Investi – Sand b. Bankru	and sy foreenin gation/V ctioned/R uptcy So	igure 179: Example o ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) yreening - (Clear/E	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No actior Investigatio	n to be do on/Suspe	ne in
Click this section) a. CAS S Investi – Sand b. Bankru	and sy creenin gation/V ctioned/R uptcy Sc	igure 179: Example o ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) preening - (Clear/E	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No actior Investigatio	n to be do on/Suspe	ne in
Click this section) a. CAS S Investi – Sanc b. Bankru	and sy Goreenin gation/V ctioned/R uptoy So CAS Sore Status	igure 179: Example o ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) preening - (Clear/E pening Detail	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No actior Investigatio	n to be do on/Suspe	ne in
Click this section) a. CAS S Investi – Sand b. Bankru	and sy Goreenin- gation/V ctioned/R uptcy So CAS Sore Status Bankrupt	igure 179: Example o ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) preening - (Clear/E poning Dotail Clear	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No actior Investigatio	n to be do on/Suspe	ne in
Click this section) a. CAS S Investi – Sanc b. Bankru 1 Profile Details 2 Academic Qualification 3 Scheme Selection 4 Type of Registration	and sy creenin gation/V ctioned/R uptcy Sc CAS Scre Status Bankrupt	igure 179: Example of ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) preening - (Clear/E pening Detail Clear	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No actior Investigatio	n to be do on/Suspe	ne in
Click Next >> this section) a. CAS S Investi – Sanc b. Bankru 1 Profile Details 2 Academic Qualification 3 Scheme Selection 4 Type of Registration 3 Screening	and sy Goreenin gation/V ctioned/R uptcy So CAS Sore Status Bankrupt Status	igure 179: Example of ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) preening - (Clear/E clear Status	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No action	n to be do	ne in
Click this section) a. CAS S Investi – Sance b. Bankru 1 Profile Details 2 Academic Qualification 3 Scheme Selection 4 Type of Registration 5 Screening 6 Others	and sy Goreenin gation/V ctioned/R uptcy Sc CAS Scrus Status Bankrupt Status	igure 179: Example of ystem will display g - (Clear/whitelis Vatchlist/Barred/S Blacklist) preening - (Clear/E clear Status	f Full Exemption Form Screening section t/Under Suspension – Under Bankrupted)	. (No action	n to be do	ne in

Figure 180: Screening section

20. Click Next >> and system will display **Others section**.

	Project	Refere	nce	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIM	M) ZANKO/FIMM	/UM/V0.1	User Manual Document	1.0	24/03/25	113
	Profile Details Academic Qualificatio Academic Qualificatio Scheme Selection Type of Registration Screening Others	The Name	UMENT 1 CHIMENT 1 CHIMENT 2	Choose File NO FILE CHOSEN	SEN /dd		
		Declaration Nome(As Per NRIC)	CALLIE ROS	85 (6)			
		NRIC I, the undersigned, hereby Trust and/or Private Retire 1. I declare and confirm	H89011211 declare my intention ment Scheme Consu n that all information i	to register with the Federation of Investment Managers tant. For this purpose, I affirm the following and documents provided to FIMM in connection with m	s Malaysia ("FIMM") as a i y application and registra	Unit lion are	
		true, current and acc 2. I declare and confirm Consolidated Rules 3. I declare and confirm 4. I undertake and agr Mataysta and any of 5. I undertake himma	curate; in that I fulfil and will o ("FCR"); in that I meet the eligit se to be bound by an her applicable taws a diately notify the minu	ontinue to ensure that I am Fit and Proper, as specified ale requirements as specified under the FCR; d comply with the FIMM Rules and securities laws issu- tail time; coal and/or FIMM in the event that I fail to catch any o	d under Chapter 4 of FiMt ed by the Securities Com	it's	
		 I understand the gravity information. I affirm that 	of the above stateme the statements made	ints and the implications of non-compliance with FIMM pherein are true to the best of my knowledge and belie	's Rules and in providing	false	

Figure 181: Others section

21. Under the Upload Supporting Document, user can upload supporting document.

Upload Supporting Document	
le Name	

Figure 182: Upload Supporting Document

- a. User need to insert file name and choose the file to upload and click
- b. Upon successful upload of the supporting document(s), system will display file details as below.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	114
						10212200000
NO	FILE NAME	ATTACHMEN	NT FILE			ACTIO

1	SUPPORT DOCUMENT	FIMM SRS - M02S01 - Registration V1.0 [FINAL].pdf	00

Figure 183: Support Document Details

c. If user did not insert file name, system will display an error message.



Figure 184: Error Message for Rename File Name

22. Under the Upload Signed Consent Form, user is required to upload the Application Consent Form. The form for the Application Consent Form can be downloaded from the system.

Upload Signed Consent Form	
Application Consent Form* IMM-Consent-Form.pdf	Choose File NO FILE CHOSEN
Figure 185: Fl	IMM - Consent Form
	Save Draft

23. To save the application as Draft, user click

to save the registration form.

a. System will display confirmation message.

Save as draf?		
	YES	NO

Figure 186: Save as Draf Message

YES and system will display successful message. b. User click

rinana	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	115

Successfully saved as draft!	
	ок



c. User click and system will redirect to the application status page. The application status is 'Draft'.

v 10 ·	- ontries				Search:	
	SUBMISSION DATE +	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME 1	STATUS 0	ACTION
	05-Mar-2025 08:53:40 am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	0
_	07-Mar-2025-09:23:02am	Prestasi Kewangan Sdn	Profile Update		Rejected	0
	21 Mar-2025 04 08:52pm	Prestasi Kewangan Sdn	Concultant Variation	UTS	Draft	Ø

Figure 188: Draft Application Status

24. To submit the application,

Tick

a. User is required to tick the agreement / declaration checkbox and click

NRIC H89011211 I, the undersigned, hereby declare my intention to register with the Federation of Investment Managers Malaysia ("FIMM") as a Unit Trust and/or Private Retirement Scheme Consultant. For this purpose, I affirm the following: 1. I declare and confirm that all information and documents provided to FIMM in connection with my application and registration true, current and accurate; 2. I declare and confirm that I fulfil and will continue to ensure that I am Fit and Proper, as specified under Chapter 4 of FIMM's Consolidated Rules ("FCR"); 3. I declare and confirm that I meet the eligible requirements as specified under the FCR; 4. I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commits Malaysia and any other applicable laws at all times;		CALLIE ROSE (B)
 I, the undersigned, hereby declare my intention to register with the Federation of Investment Managers Malaysia ("FIMM") as a Unit Trust and/or Private Retirement Scheme Consultant. For this purpose, I affirm the following: I declare and confirm that all information and documents provided to FIMM in connection with my application and registration true, current and accurate; I declare and confirm that I fulfil and will continue to ensure that I am Fit and Proper, as specified under Chapter 4 of FIMM's Consolidated Rules ("FCR"); I declare and confirm that I meet the eligible requirements as specified under the FCR; I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commis Malaysia and any other applicable laws at all times; 	NRIC	H89011211
 Frust and/or Private Retirement Scheme Consultant. For this purpose, I aftirm the following: I declare and confirm that all information and documents provided to FIMM in connection with my application and registration true, current and accurate; I declare and confirm that I fulfil and will continue to ensure that I am Fit and Proper, as specified under Chapter 4 of FIMM's Consolidated Rules ("FCR"); I declare and confirm that I meet the eligible requirements as specified under the FCR; I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commis Malaysia and any other applicable laws at all times; 	I, the undersigned, hereby	declare my intention to register with the Federation of Investment Managers Malaysia ("FIMM") as a Unit
 I declare and confirm that I fulfil and will continue to ensure that I am Fit and Proper, as specified under Chapter 4 of FIMM's Consolidated Rules ("FCR"); I declare and confirm that I meet the eligible requirements as specified under the FCR; I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commis Malaysia and any other applicable laws at all times; 	1. I declare and confir true, current and ac	ement Scheme Consultant. For this purpose, I affirm the following. m that all information and documents provided to FIMM in connection with my application and registration are excurate;
 I declare and confirm that I meet the eligible requirements as specified under the FCR; I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commis Malaysia and any other applicable laws at all times; 	2. I declare and confir Consolidated Rules	m that I fulfil and will continue to ensure that I am Fit and Proper, as specified under Chapter 4 of FIMIM's ("FCR");
4. I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commis Malaysia and any other applicable laws at all times;	3. I declare and confir	m that I meet the eligible requirements as specified under the FCR;
	 I undertake and agr Malaysia and any o 	ree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commissio inter applicable laws at all times;
 I undertake to immediately notify the principal and/or ⊢INIM in the event that I fail to satisfy any of the fit and proper criteria 		ediately notify the principal and/or FIMM in the event that I fail to satisfy any of the fit and proper criteria
	5. I undertake to imme	of the above statements and the implications of non-compliance with DMM's Dulas and in providing false

Figure 189: Declaration

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	116

b. System will prompt error message if user does not tick the agreement / declaration checkbox.

Please tick declaration	
	OK

Figure 190: Error Message

c. System will display a confirmation message.

YES	NO
	YES

Figure 191: Confirmation Message

d. User click YES and system will display submission	ו message.
Registration Application Submitted!	
	OK
	OR

Figure 192: Submitted Message

e. User will be redirect to Application Status Page. Application status change to 'Submitted'.

v	10 🗸	antries				Search:	
		SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	0 SCHEME 0	STATUS 0	ACTION
		05-Mar-2025 08:53:40am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	0
	_	07-Mar-2025 09:23:02am	Prestesi Kewangan Sdn Rhd	Profile Update		Rejected	0
		21-Mar-2025 04:08:52pm	Prestasi Kewangan Sdn	Consultant Variation	UTS	Submitted	0



Once submitted the variation application the process is completed. Please wait for your distributor review and approval process.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	117

If the variation application Returned

1. In Application Status, under column Action, Consultant click button @at Variation application. (Status: Returned)

ow 10 ~	entries				Search:	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME 0	STATUS 0	ACTION
	05-Mar-2025 08:53:40am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	0
	07-Mar-2025 09:23:02am	Prestasi Kowangan Sdn	Profile Update		Rejected	0
<u> </u>		Bhd				
	21-Mar-2025 04:08:52pm	Prestasi Kewangan Sdn	Consultant Variation	UTS	Returned	Ø

Figure 194: Variation Application Status - Returned

- 2. System will display previously submitted application and consultant can edit these fields in all previous section:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 3. Consultant can view comment from distributor the reason for returning the application.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	118

2		E. C.				
20	Academic Qualifications	Name (As Per NRIC)	CALLIE ROSE (8)			
3	Scheme Selection	Passport No	H89011211	View	v file	R. C.A.
	Type of Registration	Race	CHINESE	Nationality	Non-Malaysian	
5	Screening	Passport Expiry	15-JUL-2630	Working Permit Expiry	08-JUL-2030	
6)	Others	Date of Birth	17-JUN-1999	Age	25	- Male
		Gender	FEMALE			
		Address	TAMAN INEIAH 4			
		Postcode	50000	City KUALA LUMPI	UR	
		State	WILAYAH PERSEK	UTUAN KUALA LUMPUR		
		Phone Number	+60142656821	Alternate Phone Number		
		Email Address	callieum@yopmail.c	om		
						Next +>
turn	Comment	Application returned due to	incomplete documente.	Please make sure to upload th	e correct documents acc	cording to the reviewments

Figure 195: Return Comment from Distributor

- 4. Consultant clicks
- Submit to re-submit the application.
- 5. System checking:
 - a. If the detail is incomplete:
 - i. System will display validation message if mandatory field is blank.
 - b. If the detail is complete:
 - i. System will display successful application message and send the application for Distributor action.

Registration Application Submitted!	
	OK



ii. System back to Application Status and Status change to 'Submitted'

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	119

w 10 🛩	entries				Search:	
		DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME 0	STATUS 0	ACTION
	05 Mar-2025 08:53:40am	Prestasl Kewangan Sdn Bhd	Registration	PRS	Approved	0
_	07-Mar-2025 09:23 02am	Prestasi Kewangan Sdn Bhd	Profile Update		Rejected	0
	21-Mar-2025 04:08:52pm	Prestasi Kewangan Sdh	Consultant Variation	UTS	Submitted	0

Figure 197: Application Status – Submitted

Reschedule Exam

- 1. If the exam booking session is unavailable. System will send email and dashboard notification for user to reschedule. System will update Application status to 'Exam Re-Schedule'.
- 2. In Application Status, under column Action, Consultant click button Reschedule at Variation application with status 'Exam Re-schedule' or 'Pending Examination'.

10 ~	entries				Search	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME 0	STATUS ()	ACTION
	05 Mar-2025 08:53:40am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	0
	07-Mar-2025 09:23:02am	Prestasi Kewangan Sdn Bhd	Profile Update		Rejected	0
Г	21-Mar-2025 04:08:52pm	Prestasi Kewangan Sdn	Consultant Variation	UTS	Pending	00

Figure 198: Application Status - Pending Examination

3. System will navigate to Type of Registration page (Examination) and Consultant to select only 1 preferred date for exam session.

1						
Academic Qualifications	Please select an o	option*	EXAMINATIO	N		
Scheme Selection	Center Location		ARCNET 1		0	
Type of Registration	DATE	TIME	CENTER	STATE	EXAM	LANGUAGE
Screening	24-Mar-2025	15.00	ARCNET 1	Wilayah Persekutuan Kuala Lumpur	FCE	Malay

Figure 199: Type of Registration page – Examination

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	120

4. System will prompt error message if user select more than one exam session.



Figure 200: Exam Session - Error Message

5. The new selected exam session will be displayed under the previously chosen exam session.

	Profile Details	Exam Booking	Session					
	Academic Qualifications	Please select an o	option"	EXAMINATION				
	Scheme Selection	Center Location		ARCNET 1			0	
)	Type of Registration							
	Screening	< >			March	2025		today
		SUN	MON	TUE	WED	THU	FRI	SAT
	Others	23	24	25	26	27	28	1
		2	3	4	5	6	7	8
		9	10	11	12	13	14	15
		16	17	18	19	20	21	22
		23	24 Available	25 : 299 Available: 30	26 C Available: 30	27 Available:30	28 0 Avoilable:30	29 C Available: 300
		30	+3 more 31	+3 more	+3 more 2	+3 more 3	+3 more 4	+3 more 5
		Available: 300 +3 more		Available: 30 +3 more	Available:30	0 Available: 30 #3 more	Available: 30 43 more	Available 200 #2 more
		DATE	TIME	CENTER STA	re		EXAM LAN	GUAGE ACTION
	_	24-Mar-2025	15.00	ARCNET I Wila	yah Persekutuan Ku	ala Lumpur	FCE Mala	ву
		DATE	TIME	CENTER STAT	Ē		EXAM LANG	UAGE ACTION
		27 Mar 2025	15.00	AD/NET 1 MIL	ak flass da k as V		ECE Malau	

Figure 201: New Selected Exam Sessions

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	121

- 6. Consultant click button
 - a. System will display successful application message and book the exam session.

ок

Figure 202: Successful Application Message

b. System will auto-register the exam seat without needing approval from distributor.

Exam Failed (Resit)

- 1. In Application Status, under column Action, Consultant click button Re-Sil. At Variation application (Status: Exam Failed)
- 2. If user choose to re-sit, it will be considered as a fresh application in the system.
- 3. System will display previously submitted application and consultant can edit these fields in all previous section:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 4. During the scheme selection process for a re-sit application, user may switch to a different distributor from the previous sitting.

Submit

- 8. Consultant applicant clicks
- 9. System checking:
 - a. If the detail is incomplete:
 - i. System will display validation message if mandatory field is blank.

to re-submit the application.

- b. If the detail is complete:
 - i. System will display successful application message and send the application for Distributor action.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	122
		Registration Applica	tion Submitted!			
		regionation ppilot				
					ок	
						-

Figure 203: Successful Message

ii. System back to Application Status and Status change to 'Submitted'.

AP Enrolment

- 1. If user chose CUTA/CPRA as distributor and user does not have a CMSRL, system will auto pre-enrol Apprenticeship program for the user.
- 2. For AP, each individual has only 1 chance to join. Once utilised, no future enrolment is allowed.
- 3. AP commencement date only takes effective once the application is approved by FIMM RD.
- Each AP can re-register to another CUTA/CPRA for one time only under AP within 3 months from their AP commencement date. Re-registration with the last joined CUTA/CPRA is prohibited.
- 5. If the AP resign / being terminated after 3 months from the AP commencement date, the AP cannot re-register under AP selection and uploading of CMSRL is mandatory, unless re-registration is made to non CUTA/CPRA.
- 6. Each AP must complete the CMSRL status before the AP Expiry Date. If no CMSRL is uploaded upon AP expiry date, the status of the AP consultant will be automatically terminated, unless extension is given.

Pending AP Enrolment (Type of Registration – Examination and No CMSRL)

1. In Application Status, under column Action, Consultant click button @ at Variation application (Status: Pending AP Enrolment).

N 10 ~	ontries				Search:	
	SUBMISSION DATE #	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS	ACTION
	22-Feb-2025 11:58:54am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	0
_	20-Feb-2025 01:05:06am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Rejected	•
	22-Feb-2025-08:02:44pm	GAB PROD ADMIN MIX	Consultant Variation	UTS	Punding AP	0

Figure 204: Pending AP Enrolment

2. Consultant navigate to page Type of Registration page.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	123

- 3. Under AP Attachment section, consultant to select Professional Body and upload:
 - a. FPAM
 - i. CFP / IFP
 - 1) Proof of Active Membership
 - 2) Module 1 Result Slip or Exemption Letter

Exemption Type	FINANCIAL PLANNER (A	SSOCIATE)	
Professional Body	FINANCIAL PLANNING A	SSOCIATION OF MALAYSIA	
rofessional Qualification	Islamic Financial Planner (IFP)	
Proof of Active Membership	2 Choose file to upload		
	sample_file.pdf	00	
FP Module 1 Result Slip/Exemption Letter	Choose file to upload		
	lesidata4.pdf	00	

Figure 205: Professional Body – FPAM

b. MFPC

- i. RFP / Shariah RFP
 - 1) Proof of Active Membership
 - 2) Module 1 Result Slip or Exemption Letter

Exemption Type	FINANCIAL PLANNER (A	SSOCIATE)	
Professional Body	MALAYSIAN FINANCIAL	PLANNING COUNCIL	
rofessional Qualification	Shariah Registered Finan	cial Planner (Shariah RFP)	
Proof of Active Membership	L Choose file to upload		
	sample_file.pdf	0	
Shariah RFP Module 1 Result Slip/Exemption Letter	1 Choose file to upload		
	testdata4.pdf	0	

Figure 206: Professional Body - MFPC

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	124

- 4. Consultant clicks Submit to re-submit the application.
- 5. System checking:
 - i. If the detail is incomplete:
 - a. System will display validation message if mandatory field is blank.
 - ii. If the detail is complete:
 - a. System will display successful application message and send the application for Distributor action.

Registration Application Submitted!	
	ок
	on

Figure 207: Successful Message

b. System back to Application Status and Status change to 'Submitted'.

Failed CAS Screening

1. In Application Status, under column Action, Consultant click button 📀 at Variation application. (Status: Rejected / Submitted)

ow 10 +	entries				Search:	
	SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	1 SCHEME	0 STATUS 0	ACTION
_	23-Feb-2025 12:22:10pm	Prestasi Kewangan Sdn	Registration	UTS	Approved	0
	24-Feb-2025 04:12:51pm	Prestasi Kewangan Sdh	Consultant Variation	PRS	Submitted	0

Figure 208: Application Status – Submitted

- 2. System will display previously submitted application and consultant:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 3. Under Screening section, Consultant can view failed CAS status.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	125

- a. For non-conditional CAS tag, system will auto-reject the application and display message "You have been suspended/barred/blacklisted by FIMM. Kindly contact FIMM for further information".
- b. For conditional CAS Status, consultant applicant can see remarks from LRA of the training need to attend to uplift the conditional status. (No Action to be taken here).

Screening Others	NO	DESCRIPTION OF AC		START DATE	END DATE	FULFILMENT
Screening	NO	DESCRIPTION OF AC	TIVITY	START DATE	ENO DATE	FULFILMENT
Screening						
Type of Registration	Conditio	onal Remark	Please attend o	ne (1) training program		
Schome Selection	Conditional		🖲 Yes 🔘	No		
Academic Qualifications	Status		Suspension - S	anctioned -		
	CAS	Screening Detail				
	-					

Figure 209: Failed CAS Screening

Failed Bankruptcy Screening

1. In Application Status, under column Action, Consultant click button 💿 at Variation application. (Status: Submitted)

iow 10	÷	entries				Search:	
		SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	1 SCHEME	0 STATUS 0	ACTION
		23-Feb-2025 12-22-10pm	Prestasi Kewangan Sdn Blod	Registration	UTS	Approved	0
		24-Feb-2025 04:12:51pm	Prestasi Kewangan Sdn	Consultant Variation	PRS	Submitted	0

Figure 210: Application Status – Submitted

- 2. The system will display previously submitted application and consultant:
 - a. Profile
 - b. Academic Qualification
 - c. Scheme Selection
 - d. Type Of Registration
 - e. Screening
 - f. Others
- 3. Under Screening section, Consultant can view failed Bankruptcy Status. (No action to be done by a consultant inside the system).

	Project	Reference	File	Version	Date	F
ation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	
	1 Profile Details 2 Academic Qualifications 3 Scheme Selection 4 Type of Registration	CAS Screening Detail Status Bankrupt Status	iear •	1		
	Screening 6 Others	Status Bi Bankrupt Release Letter	IND FILE CHOSEN			
	ee Prev				N	ext >>

Figure 211:Failed Bankruptcy Screening

Terminated / Revoked Consultant

- 1. Terminated/Revoked Consultant re-apply re-registration (Status: At least 1 scheme is terminated)
- 2. Click on Consultant Menu and Profile Management submenu.



Figure 212: Submenu for Variation Registration

- 3. System will display the main page of consultant detail divided into these tabs as follows:
 - i. Registration Info
 - ii. Profile
 - iii. CPD
- 4. User click 'Profile' tab. Under 'Profile' tab, system will display profile details.

	Proje	ct	Reference		Fil	е	Version	Date	Page
Eration of Investment Managers Malaysia	Federation of Inve Managers Malays	estment sia (FIMM)	ZANKO/FIMM/UM/V0	.1	User Manual	Document	1.0	24/03/25	127
	Brafile								
	Prome								
								1	
	0	Profile Details	Personal Deta	ails					
	(8)	Academic Qualification	Name (As Per NRIC)	SENROSE ALM	A (W)		MAC		
	(3)	Scheme Selection	Passport No.	D45675678	4	lew File			
	۲	Type of Registration	Race	CHINESE	 Nationality 	Non-Malaya +	A MARE		
	(6)	Screening	Passport Expiry	17/06/2027	Working Permit Expiry	DD/MM/YYY			
		Others	Date of Birth	19/02/1998	Age	27	Chume File N., EN		
			Gender	FEMALE	10				
			Address	TAMAN MAJU	AYA				
			Postcode	30000	City	IPOH .			
			State	PERAK	Phone Number	+60142656821			
			Email Address	aanroseum@yc	pmail.com				

Figure 213: Profile Detail

- 5. Click , system will display all action that can be done:
 - i. Apply (Hide if both schemes registered)
 - ii. Update Profile (Hide if no distributor attached)
 - iii. Appeal (Hide if not revoked / no declaration done)
 - iv. Renewal (Hide if not renewal period / no declaration done)

Renewal	
Update Profile	
Apply	
Apply	

Figure 214: Variation Menu

6. Consultant click 'Apply' and follow the next step as Variation of Registration process as stated in section U – Variation of Registration.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	128

risasa	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	129

V. CONTINUING PROFESSIONAL DEVELOPMENT (CPD) MODULE

The CPD Management Module (M05) is part of the Federation of Investment Managers Malaysia (FIMM) Registration System and is designed to facilitate and regulate the Continuing Professional Development (CPD) activities for industry professionals. It ensures compliance with training requirements, manages program approvals, and tracks CPD points.

• Sub-Modules of the CPD Management Module to allow consultants to submit CPD activities to obtain CPD points.

1. 5 Module CPD Submission

- Manages CPD point collection based on five modules:
 - a. Reading
 - b. Writing
 - c. Teaching
 - d. Qualification
 - e. FPAM (Financial Planning Association of Malaysia)





Submit Program

1. Click menu Continuing Professional Development. System will display submenu under Continuing Professional Development.



2. Click submenu 5 Module.



Figure 216: Submenu

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	131

3. System will show List of 5 Module.

baid	5 module					
rtant / ·	FIMM > cro >	E modula				
noing Professional -						
opnent	Program Title		Status			
hulle	- Chu		Chexase	- Chusse - 🔹		
	CPD Code		Submission Date			
1.			qq:mm:3333	D		
star a - <u>"Them</u> All ingenits en neuroset.						+ Add here wa
1272 : Inne All ingels in write	Stow 10 v i	NUTLINS SULHIMI SOCIA DATE	 C20 C00E 	PROXABAN TITLE	STATUS	+ 410 MM MU
1823 - Inne All Ingris commu	Stow 10 × 1	NUMBES SCHILDATE SCHIMES SCHILDATE (55 Mar 2025	5 CPD CODE 16 16/V25100192	PROCRAM TITLE Write and Publics	d Status Approved	+ AND New Yor ACTION
 173 - ™II di igfe innere	Show 10 v 1	NUMES SCH DETE SUMES SCH DETE 0544a-2025 0544a-2025	1 CP9 CODE 18 140/025100192	PROCREME TITLE White and Platfack Teach or Speak	SOUTIS Againand Dawn	Action
273 - Milligfel Bennive	Stew 10 v 1	NUMAN SIGN DATE SUMAN SIGN DATE 0554a-2025 0544a-2025	1 679 code 18 14/02 500 192 -	PROCERAM TITLE White and Plastics Track or Speak FPMM and PSPC	STATUS Status Approved Down Down	ACTUR ACTUR 0 0
- 1/23 Xê Kirê û noverse	Staw 10 v 1 80 * 1 2 3 4	HURDEN KURDEN SICON DATE 05546a-2025 05546a-2025 15546a-2025	CP9 CODE 18 166/025 100 192	PROCERAM TITLE White and Plastick Teach or Speack FFMM or MFPC Academic or Professionel Qualification	STATUS Approved Drvit Onat Drvit	Action on
1/23 ***** JÆ Kýrké konneve	Show 10 v 1 10 v 1 2 3 4 Showing 1 to & of 4 eet	HELDERS SCHIMMES SCON OATE 05546a-2025 05546a-2025 05546a-2025 05546a-2025	CP9 CODE 18 1401/02 500 192 - - -	PROCRAM TITLE White und Plastick Teach or Speak FPMM or MF PC Academic or Professioned Quelification	Status Approved Drain Orant Drain	

Figure 217: List 5 Module

Q Find

.

- 4. User can filter the list by either one or more types and click
 - i. Program Title
 - ii. Status
 - iii. CPD Code
 - iv. Submission Date

	=					Ennoted	8 AUDICS 100001 -
choverd		5 madule					
	20 ¹	EIMM > CPD > E	Emodela				
nineing Professio velopment	nd -	Program Title		Salua			
odulie				Chorise	•		
		CPID Code		Submission Date			
				ddimm/yyyy	D		_
							Ø Reset
							+ Add time Mode
		5how 10 v in NO *	SCHAM S SICH DATE	CPOCOLE	8 PROGRAM TITLE	STATUS -	+ Add twee Wester
		Show 10 v in NO *	NUTION SUTHIN S SUCH (24 TE) 95 Mai - 2025	CPO CODE 18 166/W25100 152	PROGRAM TITLE Withs and Publish	a status a Approved	+ Add twee Musse ACTION
		Show 10 v in NO * 3 2	SUMMS SICH DATE 95-Mai-2025 95-Mai-2025	CP9 CODE 18 168/W25300 HS2 -	PROCERAM TITLE White and Plastals Teacts or Speak	status Approved Dran	+ Ald feed Ausse
		Stow 10 v in 10	NUMER SUMMESSICH DATE 05-Mar-2025 05-Mar-2025 05-Mar-2025	CP9 COSE 18 168/025 100 192 -	PROCESSAN TITLE Write and Publish Teach or Speak FPMM or MFPC	status Accord Dvin Drift	ACTION ACTION
		Show 10 9 10 80 4 1 2 3 4	NUMES SUMMESSON DATE 105-Mar-2225 06-Mar-2025 06-Mar-2025 15-Mar-2025	CV9 CODE 19 168/V25 108 152 - - -		STATUS Approved Down Orant Down	ACTECH AND

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	132

5. User click Reset to

to clear the filter.

About 5 module Stratut • EIMM > CPO > Emoc Building Professional •						
tant CPD > Emod						
ing Professional -	dela					
Program Title		Status				
		Chouse	•			
CPD Code		Solution Date				
		qq:aau-AARA	D			
					O Read	En
Show 10 v sutiles	s.)				+ A10 1444 M	933.
Stuw <u>10</u> within NO *	SUBBILISSION CLATE	CPO CODE	E PROGRAM TITLE	a status	+ Add time of	****
:51ww 10 v subies	SURMISSION DATE	CP0 CODE 18 166W25 100 112	PROGRAM TITLE Yhite and Public	status Approved	ACTION	
Shew ng wither	5 SUBMISSION DATE 05-Mai-2025 05-Mai-2025	CP9 CODE 18 166/W25 100 192	PROGRAM TITLE Where our Plasta Teach or Speak	STATUS Approved Dran	ACTION	-
Show 10 whether 1 1 2 3	5 SUBBES SICH EATE (55 Mai-2025 36 Mai-2025 36 Mai-2025	CP0 CODE 18166/425100152	PROGRAM TITLE White and Public Teach or Speak FPMA or MFPC	STATUS Apparent	ACTION	1
Show 10 white 1 3 4 3 4 4	s SUBBRS SICH DATE 15-54a-2025 3-54a-2025 15-54a-2025	CP9 CODE 10 100/025100192 	PROGRAM TITLE Yhite and Publick Teach or Speak FPMM or MFPC Academic or Professional Qualification	6 Status 6 Accased Dran Dran Dran	ACTOR	
Show to v soules	s 50.000 DATE 0 05.46a-2025 05.46a-2025 15.46a-2025 15.46a-2025	CP9 CODE 18 160425100182 - - -	PROGRAM TITLE White and Publish Transh or Speak FFMM or MF PC Academic or Professional Qualification	i Status i Appared Drah Orat Drah	Action	

Figure 219: Reset

6. User can choose total entries to display per page.

is module EIMM = CPO = Emodele Program Title CPD Code	Sans - Chone - Schmister, Date dit arth 1733		•		
Finte > CPO > Emedia Program Tala CPB Code	Status - Chause - Submission Date datarra yyyy		•		
Program Tille	Status 7/10356 Solomianiem Date ddiaron/yyyy				
Program Taba CPD Code	Status Thome Submission Date dd.mm.yyyy		•		
CPE Code	Solominion Date ddiarmiyyyy				
CPD Code	ddimm/yyyy				
	10.0 00.13333	Sobmission Date			
					Ø Renet Q F
Show 10 v outles					
Show 30	CPO CODE	PROGRAM TITLE		STATUS I	ACTEON
Show 10 v institut No * Suthers SUH Date 1 05 Mar-2025	CP0 CODE 18 166W25100132	PROGRAM TITLE Write and Publish		1 STATUS + Approved	ACTION
Stew 10. within 1 45544055000000000000000000000000000000	CP0 CODE 18 168/W25 100 192	PROGRAM TITLE White and Publish Teach or Speak		I STATUS I Approved Draft	ACTOR O
Stow 10. w instance 1 054400 55400 2 254400 2545 3 254400 255	CPD CODE 18 166/025 100 192 -	PROGRAM THEE White and Publish Teach or Speak FRMM ar MFPC		STATUS Approved Draft Oraft	

Figure 220: Filter Total Entries

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	133

7. System will show number of entries at the bottom of the list.

board	5 module					
utant / 🚽	FIMM + CPD >	Emodala				
naing Professional -						
tude	Program (ites Nature -					
				- Churse - •		
	CPD Code		Submission Date	Sobmission Date		
11. 			. uq. m.m./3333	D		
						Ø Rent Q
t 22 - Tomi Allingtis Inservet.	Show 10 v I	eacties :				+ 430 tere wa
a 1973 : "New Altrights insures".	Show 10 v k	NUTLINS SULINITS SCIN (DATE +	CPD COSE	1 PROBANTILE.	1 STATUS 1	+ Ald here has
er 1975 - Talling Friedrich, fan Hanner ver	Stew 10 v 1	NUMME SIGN CATE 95 Mar 2025	CP0 CO16 18 168/025 100 192	PRESERVENTIE Write and Public	a status a Approved	+ Add here lives
er NGS 2000 Allights inserved	Show 10 v i	entiles SUBBITS SCHIDTE P 9540a-2025 8540a-2025	CP0 CODE 18 168/25 100 132	PRESONAN TITLE Write and Publish Teach or Speak	STATUS Account Draft	ACTEM
et NG2 : "	Show 20 v 1 no + 1 2 3	entries Science S SCOI DATE 0.5.54(a) - 5225 0.5.54(a) - 5225 0.5.54(a) - 3225	CP9 CODE 18 168/025102112 -	PROGRAM TITLE Write and Platfab Tractor or Spank FRMM or MFPC	STATUS Associed Down Orat	ACTION
er Nato All infer in surreet	Stew 10 y 1 80 * 1 2 3 4	entries SERIERI SICON DATE P 05-540a-2025 05-540a-2025 15-540a-2025	CP9 CODE 18 16/W25 100 192 - - -	PROGRAM TITLE Write and Publish Track or Speak FRMM or MFPC Academic or Pryfessionel Qualification	Status Approved Down Orat Down	Action was
et 1923 - Milligfe America	Show 10 v 1 80 ° 1 2 3 4 Showing 1 to 4 of 4 end	entries SUBBEI SICH DATE 1 05.454:e-3025 15.44:e-3025 Xem	CP9 CODE 18 160/025100192 - - -	PROGRAM TITLE Write and Publish Track or Speak FRMM or MFPC Academic or Professional Qualification	Status Approved Down Orat Down	Active and

Figure 221: Total Entries

8. System will show pagination at the bottom of the list. User click on the numbers and system will show the listing on the next page.

///// =					Constant	8 8112815100001
iaid	5 module					
tent) set is	Fimm > cro > (E modula				
ing Professional -						
	Program Title		Status			
		Teleconae		7,		
	CPD Code	Submission Date				
i i i i i i i i i i i i i i i i i i i			qq:mm/3333	D		
						Ø Renet Q I
73 - Youni All ngada enversed.	Show 10 V II	nuties				+ 430 New 1993
23-1999 (Alight Course	Show 10 v H	NUTLINS SUCH DATE	CP9 CODE	E PRESERVE THEE	8 STATUS	+ Alth Tank Mill
25 : "INTERATIVA ANTINATA	5how 10 v 8	NUMERS SOLINERS SOCIE CATE 05-Mai-2025	699.0016 181669425100152	 PROGRAM TITLE Withs and Pladak 	i status Asproved	Action
23 - The Adding the seconds	Stew 10 v H	souties Souties Sicon Date 05.Mai-2025 86.Mai-2025	CP9 CODE 18 168/V25 100 192	PROGRAM TTLE White and Publish Teach or Speak	STATUS Approved Dran	+ Ald here has ACTOR
23 - Ming African Kanan Ka	Show 10 v 1	entiles SUMMESSON DATE 05.Mar-2025 06.Mar-2026 06.Mar-2026	CV9 CODE 18 168/W25 100 192 -	PROGRAM THEE White and Pitablas Teach or Speak FPMM or MFPC	STATUS Approved Draft	ACTOR 0
23 - Ming Africa Innered	Stow 10 v 1 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	entiles SUMMESSON DOTE 15 Mai 2025 SS.Mai 2025 15 Mai 2025 15 Mai 2025 15 Mai 2025	CP9 CODE 19 16/025100132 - -	PROGRAM 1111 F Yolina and Publick Teack or Space FORM or MF PC Academic or Professional Qualification	Status Approved Drant Drant Drant	Actor
23 - Ming African Kananaka	Show 10 v 1 1 1 2 3 4 Bitoolog 1 to 4 of 4 exit	natina Sulimi Sicini Gere 05 Mar 2025 05 Mar 2025 05 Mar 2025 15 Mar 2025	CP9 CODE 19 166/025102132 - - -	PROGRAM TTHE White and Platish Teach or Speak FRMM or MFPC Audionic un Pryfessionel Qualification	6 Status Accord Dut Dut Dut	
23 - Yan Jaking da Innerede.	Show 10 v ii 10 v 2 3 4 Show 10 k of 4 eets	NUTHIN XOUMINI SNOW DATE 455 Mar - 2025 455 Mar - 2025 155 Mar - 2025 vrim	C79 COPE 18 166/025 100 192 - - -	PROGRAM THEE White and Platitus Freek or Speak FFOM or MFIPC Academic or Professionel Qualification	i status Apporei Drati Drati Drati	ACTOR ACTOR O O O O O O O O O O O O O O O O O O
23 - San Jaking da kananak	Show 10 v ii 10 v ii 2 3 4 Showing 1 to 4 of 4 exten	extrine 3UUMB SSON CATE 55448-3225 85448-3225 85488-3225 15548-3255 1558	CP0 CODE 18 168/025 100 192 - - -	PROGRAM TITLE Write and Publish Teach or Speak FIPEM or MFPC Academic or Professional Quelification	Status Aparonel Dran Dran Drah	Action Action O O O Popyteer 1 Pe

Figure 222: Pagination

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	134

9. Click

to submit new 5 Module.

the second se					Constants	
hboard	5 module					
outent : -	FIMM + CPD >	E modula				
insing Prefessional -						
dule	Program Tidas	Program teas				
	CPD Code		Submission Date	Sobmission Date		
16.			naurasiyyiy	D		
4						Ø Reset
	NO +	SURIM'S SIGN DATE	CP0 CODE	1 PROGRAM TITLE	STATUS	
						ACTION
	1	05-Mai-2025	18166W25100132	White and Publish	Approved	ACTION
	1	05-Mai-2025 05-Mai-2025	18 168/W25100 192	White and Publish Teach or Speak	Approved	
	1 2 3	15-Mai-2025 85-Mai-2025 85-Mai-2025	18 164W25 420 192	Write and Publish Teach or Speak FPMM or MFPC	Approved Draft Oraft	ACTOR
	1 2 3 4	95-Mai-2025 85-Mai-2026 95-Mai-2025 85-Mai-2025	18 166W25 100 192 - - -	With and Puzalah Teach or Speak FRMM or MFPC Academic or Professionel Qualification	Approved Draft Draft Draft	

Figure 223: Submit 5 Module

10. System will display this form. User fill in the details:

Consultant Details

i.

- a) Name
- b) NRIC/ Passport No
- c) FIMM No
- d) Phone Number
- e) Distributor Name
- f) Distributor Code

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	135

ii. Application Details

a) Category (Choose from Dropdown)

Fimm =					Dormatore	AUDRIS100001 -	20
E Duchbeard	5 module						
🖶 Consultant 🔹	FIMM + CPD > Emodela						
Continuing Professional - Development							
5 Module	1 Application	Consultant Details					
HORE:		Name		Phone Number			
A Palls		PATICONSULTANT	AMSP 1	0115111111			
O Linna		NRIC/Pasaport No		Distributor Name			
Copyright © 2023 From All rights in served.		610203100001		PAT DIST 2 (UTMC PR8P)			
		FIMM No		Distributor Code			
		F01001769		10168			
		Application Details					
		Category	Chrasse				
						820	

Figure 224: Form 5 Module

User click Back

iii.

to go back to List of 5 Module.

NKIC/Passport No	Distributor
The data you have entered will be lost. Are you sure want to leave this p	age?
F	YES NO

Figure 225: Popup Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	136

	Proceed
User click	

iv.

to go to the next form.

Application	Consultant Details			
	Name		Phone Number	
	PAT CONSULTANT AMSP	1	011111111	
	NRICIPassport No		Distributor Name	
	810203100001		PAT DIST 2 (UTMC PRSP)	
	FIMM No		Distributor Code	
	F01001769		10168	
	Application Details			
	Category	Academic or Professional Qualification		Proceed

Figure 226: Form 5 Module

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	137

11. System will display this form. User fill in the details.

IMM =			Consultant 🙆 Anizatisteeed	-
hanhowed	5 module			
irrouted -	FIMM + CPO + 6 modela			
onlineing Professional - Involgement				
Module	Application	Consultant Dotails		
(197)	-	Natur	Phote Number	
eller Anno		PAT CONSLETANT AMS/ 1	01111111	
head		NRIC/Person No	Distributor Name	
a 2023 - This All rights assessed.		819205100301	PAT DIST 2 (UTMC PROP)	
		FillM No	Disatibutor Code	
		F01001753	10160	
		Academic or Professional Qualification	•	
		Inte	Qualification	
		- Chiose	 - Choose-	
		Date Completion	Organisation/ institutal University	
		DD/MWYYYY		
		Additional Document		
		Upload Document		
			Fact Save Duit Saver	

Figure 227: Form 5 Module

- i. Consultant Details
 - a) Name
 - b) Phone Number
 - c) NRIC/ Passport No
 - d) Distributor Name
 - e) FIMM No
 - f) Distributor Code

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	138

- ii. If Category = Academic or Professional Qualification Program Details
 - a) Category
 - b) Type
 - c) Qualification
 - d) Date of Completion
 - e) Organisation/ Institute/ University

Category			
Academic or Professional Qualification			+
Гуре		Qualification	
- Choose	Ψ.	Choose	
Date of Completion		Organisation/ Institute/ University	
DD/MM/YYYY			
Additional Document			
Upload Document 🙆			

Figure 228: Form 5 Module

If Category = FPAM or MFPC

- a) Category
- b) Type
- c) Module
- d) Date of Completion
- e) Organisation/ Institute/ University

Additional Document			
	<u> </u>		
bate Completion	_	Organisation/Institute/University	
Choose	•	Choose	
уре		Module	
FPAM or MFPC			•
ategory			

Figure 229: Form 5 Module

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	139

If Category = Teach or Speak

- a) Category
- b) Title
- c) Date
- d) Venue
- e) Organizer
- f) Start Time
- g) End Time

	*
Date	
DD/MM/YYYYY	
Organizer	
End Time	
	0
	Date DD/MM/YYYY Organizer End Time



If Category = Write and Publish

- a) Category
- b) Type
- c) Title
- d) Date of Published
- e) Publisher

	Project	Reference	File	Version	Date	Page
of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	140
Application Det	ails					1
Category						
Write and Publis	h					*
Туре			Title			
- Choose						
Date of Published	ũ.		Publisher			
DD/MM/YYYY		0				
		Figure 231: I	Form 5 Module			
ii	i. Additional Do a) Uplo	cument bad Document				
iv	v. User click 🔮	to upload file.				
Additional Doc	ument					
Upload Documer	at 😆					
		Figure 2	32: Upload			

v. System will display a popup. a) Upload

Upload	×
Upload File Choose File No file chosen	
	Upload Cancel

Figure 233: Upload



Figure 234: Popup Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	142

viii. System will display error message if the file exceeds 2 MB.



Federation of Investment Federation of Investment Managers Malaysia (FIMM) ZANKO/FIMM/UM/V0.1 User Manual Document 1.0 24/03/25 143		Project	Reference	File	Version	Date	Page
Managolo Malayota (FMM)	Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	143

Record successfully saved. (Save only)



	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	144

Submit

xi. User click to submit the application to FIMM/ Distributor.

Notes:

• If consultant is not attached to any Distributor (i.e. Terminated), the application will be sent to FIMM PDS.

Confirm to proceed?	
	YES NO

Submitted.	
	ок

Figure 238: Popup Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	145

View Application and Log

12. In List of 5 Module, user can view applications for all statuses. User click ⁽²⁾

AW =						Longitar	A 100001 - 100001 - 100001 - 100001 - 100001 - 10000001 - 10000001 - 10000001 - 100000000
said	5 module						
tent:/	EIMM + CPD >	E modula					
eing Professional -							
	Program Title		Status	Contract of the second s			
			-13	NOUSSE	73		
	CPD Code		Sabmi	anion Date			
L			data	un.yyyy	D		
							Ø Reset
23.°°°° All ngata in narvet.	Show 10 y I	outies					+ 440 News Weste
23 - Wein All Ingels Insurved.	Stew 10 v H	naties Sciences con date	CP0 6086	1 PROCESSIN THE F		51211/3	+ A30 New W232
V3 - mai All igiti connict	Show 10 v s	enties scatter Size (5-Mar-2025	E CP0 CORE	PROGRAM ITTLE Willie and Picklish		STATUS Pending Approval	+ A10 Mer W22
23 - www. / Wing thi to normed	51ww 10 w H	sunnesson pare 9.5-Mar 2025 8.5-Mar 2025	CPR CORE	 PROGRAM ITTE E With and Publish Teach or Spank 		STATUS Pendita Approval Duali	
ussen Allingth (source)	50ww 10. v a	natiles National Society (1975) 45-Main 2025 45-Main 2025	2 CP0 0006 - -	PROGRAM ITTE # With and Publish Teach of Spank FWMA or NSPC		SUATUS Pesidika Approval Dualt Dualt	
15° - m / Angele innerve	50ww 10 w 8 10 * 3 4	natiles wunnigeScrip (Jatro 45-Marc 2025 45-Marc 2025 45-Marc 2025	CP0 CO04	PROGRAM ITTE E Wilds and Fuldah Teach of Spank FWM or NFPC Academic or Professional Qualification.		Status Pesisting Approval Druth Druth Druth Druth	

Figure 239: List 5 Module

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	146

- 13. System will display:
 - i. Tab Details

IMM =						Constant 🙆 MILLISTODOT -	
highboard	5 module						
ensuted ()	FIMM + CFD + Emodule						
Continuing Professional -							
Madala	0 Detelle Diag						
	- 11						
ins)	1 Application	Consultant Details					
gout		Name			Phone Number		
0.2021 Millione energy	insuriei.	PAT CONSULTANT AMSE 1			011111111		
	NRIC/Passport No			Disalibator Name			
	610203100001			PAT DIST 2 (UTMC PRSP)			
	FIMM No			Distributor Code			
	P01001705			10160			
	Application Details						
	Category						
		Wile and Publish			•		
		Тура			Tite.		
		DOOR			MEMISAGA AMALAN MULIA		
		Date of Published			Publisher		
		00.000.202.0			2 ANN		
		Additional Document					
		Upload Document	NO	rite		ACTION	
			1	DUMMY FILE 3 pdf		0	
			2	Madale 1 pdf		0	
		k					
		Remark					
						680	

Figure 240: Form
	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	147

- Tab Log (Log history of the application): a) Date ii.

 - b) Process
 - c) From
 - d) Status
 - e) Remarks

Fimm	=						Ennañ	- 1000001 -	20
Deciderand Consultant Constraining Phylicisian Development	1 1 1 1 1 1	5 module FIMM = CPD - 5 module 0 Datal - 9 Log							
none A Parla O Lopost			Dete	Process	From Daniel Tester Stanlor	Status	Remarks		
Copyright & 2023 - Ministra	maneral.		05-Mar-2025 14:21:11		PAT Consultant AMIF 1	Pending Approval	-		
								Det	
									•

Figure 241: Log

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	148

W.Renewal

This section explains regarding the submission by consultant (Group C only) for renewal declaration.



1. Click Profile Management under the Consultant submenu.



Figure 242: Profile Management Sub Menu

2. System will display the main page of consultant detail.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	149

1. Profile			
Name	SENROSE ALIA (VI)		FIMM Virtual Card
NRIC / Passport No	D45675678	FIMM No	F02029109
FIMM Joined Date	04-MAR-2025		
Z. Apprenticeship Pro	Stanting		
2. Apprenticeship Pro 3. Unit Trust Scheme	<u>granni</u>		
3. Unit Trust Scheme	Qualitity		
Appronuceshis Pri Junit Trust Scheme A. Private Retirement	Scheme		
Appronuceshis Pri J. Unit Trust Scheme A. Private Retirement Distributor Name	Scheme PRESTASI KEWANGAN SDN RHD		
A. Appronnesship Pri J. Unit Trust Scheme A. Private Retirement Distributor Name Distributor Joined Date	Scheme PRESTASI KEWANGAN SDN BHD 04.MAR-2025		

Figure 243: Registration Info

User click tab 'Profile', system will display profile details.

D	Profile Details	Personal Deta	ails			
0	Academic Qualifications	Name (As Per NRIC)	SENROSE ALM	(W)		PLAC
Ð	Scheme Selection	Passport No.	D45675678	V	iow Filo	
9	Type of Registration	Race	CHINESE .	Nationality	Non-Malays +	
0	Screening	Passport Expiry	17/06/2027	Working Permit Expiry	00/MM/YYY	
0	Othere	Date of Birth	19/02/1998	Age	27	Creme File N. EN
		Gender	FEMALE .	1		
		Address	TAMAN MAJU J	AYA		
		Postcode	30000	City	IPOH .	
		State	PERAK	Phone Number	+60142656821	
		Email Address	senroseum@yo	pmail.com		



	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	150

- 3. User click ■
- and choose 'Renewal'. This option will be made available if:
- i. Within Renewal period. (FIMM will announce once the renewal submission is opened)
- ii. Consultant's Registration Status is Active.



Figure 245: Action Sub Menu

- 4. System will display Renewal page with four tabs:
 - i. Registration Info
 - ii. Profile
 - iii. CPD
 - iv. Renewal.
- 5. In tab Renewal, system will display all information required for Renewal.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	151

- 6. The conditions for renewal are as follows:
 - Consultant must obtain a minimum of 16 CPD points in the current year before an application for renewal of his registration will be considered by FIMM.
 - ii. Where a Consultant has registered with FIMM after January of the current year, the CPD points' requirements for his first renewal will be calculated on a pro-rata basis.
 - iii. If CPD Points is sufficient for renewal, renewal process is allowed. Else, system will block to proceed for renewal process.
 - iv. Once user submit, the renewal request will be sent to the registered distributor.
- 7. If Consultant meet all conditions for renewal, system will display.
 - i. Renewal section
 - a. Year (Note: Subsequent Year)
 - b. CPD Points for Renewal (Note: Based on prorate calculation)
 - c. CPD Points Collected (Note: Total CPD Points that had been collected and approved in current year)
 - ii. Declaration section
 - a. Name (As per NRIC) (Note: Automatically populate)
 - b. NRIC/ Passport No (Note: Automatically populate)
 - c. Tick box for declaration*

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	152
	Invertiegets Weldsyste ((* IVIIV))	train train train train train train train tra	Remained Remain			
				X40.0007374575		

Figure 246: Renewal page

- iii. To submit the application,
 - a. User is required to tick the agreement checkbox and click button

Submit

b. System will display popup message "Confirm to proceed?"

Confirm to proceed?		
	YES	NO

Figure 247: Popup Proceed Message



	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	153
					-	
					1	
		Renewal Re	quest Submitted!			
					OK	

Figure 248: Pop Up Submitted Message

d. Status change to "Submitted" in Application Status.

ow 10 v entries			Sea	rch:	
		APPLICATION TYPE	¢ SCHEME ¢	STATUS 0	ACTION
05-Mar-2025 08:38:14am	Prestasi Kewangan Sdn Bhd	Registration	PRS	Approved	٢
05-Mar-2025 09:27:07am	Prestasi Kewangan Sdn Bhd	Profile Update		Submitted	0
05 Mar 2025 11:51 18am	Prestasi Kewangan Sdn Bhd	Renewal	PRS	Submitted	0

Figure 249: Renewal Submitted Status

8. If the CPD Points collected is not sufficient for renewal, system will display "You have insufficient CPD for renewal. Kindly contact your distributor and complete the CPD requirement by 31 December <current year>."

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	154
		ANAL ST				
	Registration info Profile	Renewal				
	Renewal					
			Renewal			
	Year 2026					
	CPD Points for Renewal 13					
	CPD Points Collacted					
	You have your debr 31 Decem	insufficient CPD for renewal. Kindly contact butor and complete the CPO requirement by ther 2925				
					the form	
				E4		

Figure 250: Renewal - Insufficient CPD Points

- 9. User click Back button,
 - i. System will display popup message "Unsaved data will be lost. Do you want to continue?".

nsaved data will be lost. Do you want to continue?		
	YES	NO

Figure 251: Unsaved Data Message

10. User can navigate to Application Status submenu under the Consultant menu to view Application Status.



Figure 252: Application Status submenu

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	155

X. Appeal for Revocation

This section only applicable for consultant that has been revoked by FIMM.



1. Click Profile Management under the Consultant submenu.



Figure 253: Profile Management Sub Menu

2. System will display the main page of consultant detail.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	156

I. Profile			
lame	SENROSE ALIA (VI)		FIMM Virtual Card
IRIC / Passport No	D45675678	FIMM No	F02029109
IMM Joined Date	04-MAR-2025		
. Apprenticeshia Pre	2gramme		
L. <u>Apprenticeshia Pr</u> Unit Trust Scheme	zgramme		
2. Apprenticeshie Pr 3. Unit Trust Scheme	2gramme		
2. Apprenticeshie Prr 8. Unit Trust Scheme 1. Private Retirement	2gramme Scheme		
2. Apprenticeshie Pro 3. Unit Trust Scheme 1. Private Retirement Distributor Name	2gramme Scheme PRESTASI KEWANGAN SDN BHD		

Figure 254: Registration Info

- Profile :0 Personal Detail Name (As Per NRIC) e Seler et No on of Recist Race CH DD/MM/YM 8 Passport Expiry Working Per 17/08/ mit File N. EN Date of Birth 27 Other 19/02/1998 Age Gender FEMALE . Address TAMAN MAJU JAYA Postcode City State Next >>
- 3. User click tab 'Profile', system will display consultant Profile page.

Figure 255: Consultant Profile page

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	157

- 4. Click
- (navigation menu), system will display all action that can be done:
- Apply

=

• Appeal



Figure 256: Action Sub Menu

5. Click 'Appeal' in the navigation menu. System will display a pop up message "Appeal request has been sent."



Figure 257: Appeal Request Sent Pop Up Message

6. Click • , user will be redirect to Appeal Details page under Appeal Revocation tab and display Appeal Details in section. (Appeal Revocation will be activated when user requested for appeal.)

Project	Reference	File	Version	Date
Federation of Investme Managers Malaysia (Fl	nt ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25
		10		
Registration Info Profile	CPD Tagang Accele Revolution	an		
Appeal Revocation				
Consultant Details				
Name	GHEN U KIEW (W)			
NRIC / Passport No	H70604321			
FIMM No	FQ1002008			
Scheme	PRS			
Revocation / Deregist	ration Details			
Revocation Type	Instruction from authority			
Effective Date	00-MAR-2025			
Grounds of Revocation	Instructions from Authoritity			
Last Date to Append	26-MAR-2025			4
Appeal Details				
Grounds for Appeal*				
	560 characters remaining			
Supporting Document"	Choose Floss NO FILE CHOSEN			
	No attachment found			

Figure 258: Appeal Revocation Tab

- 7. User has to fill in details in required fields:
 - Grounds For Appeal
 - Upload Supporting Documents

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	159
	Appeal Details					

Grounds for Appeal*		
Supporting Document*	590 characters remaining Choose Files NO FILE CHOSEN	\$
	No attachment found	



- 8. There are 4 action buttons below the page / tab:
 - Back
 - Discard
 - Save
 - Submit

appear becans		
Grounds for Appeal*		
	500 characters remaining	
Supporting Document*	Choose Files NO FILE CHOSEN	
	No attachment found	
		Back Discard Save Submit

Figure 260: Action Buttons

- Save
- 9. To save the application, user click _____,system will stay at current page.
 - i. If there are fields that had not been filled in, system will prompt a message *"Please fill in the mandatory field"*

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	160
						_
F	lease fill in the manda	atory field				
					ок	



ii. If the field has been filled in, system will prompt message "Confirm to proceed?"



Figure 263: Save As Draft Message

10. To submit the application, user click

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	161

i. If there are fields that had not been filled in, system will prompt a message *"Please fill in all required fields".*

Please fill in the mandatory field	
	ок

Figure 264: Mandatory Field Required Message

ii. If the field has been filled in, system will prompt message "Confirm to proceed?".

Con	firm to proceed?
	YES NO
	Figure 265: Confirmation Message
iii.	If user click , system will stay at current page.
iv.	If user click YES , system will prompt message <i>"Appeal Submitted!"</i> and close the application.



Figure 266: Submitted Appeal for Revocation Message

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	162

v. Click ok , user will be redirect to Application Status Page.

now 10 v entries				Search:	
SUBMISSION DATE	DISTRIBUTOR NAME	APPLICATION TYPE	SCHEME	STATUS	+ ACTION
08-Mar-2025 12:49:46pm	MENTARI BERHAD	Registration	PRS	Approved	0
05-Mar-2025 03:03:18pm	MENTARI BERHAD	Appeal Revocation	PRS	Submitted	0



- 11. To discard the application, user click
 - i. System will prompt message "Discarded draft cannot be recovered. Do you want to continue?".

Discard

Discarded draft cannot be recovered. Do you want to continue?		
	YES	NO

Figure 268: Discard Application Confirmation Message

ii. If user click **YES**, system will prompt message "*Application has been discarded*" and delete the application.

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	163
_						_
			\checkmark			
		Application h	as been discarded			
					OK	
	Figu	re 269: Application I	Discarded Prompt Message			
		NO				
ii	i. If user click	, system w	vill stay at current page.			
12. lf u	Back					
			6 11 1 1 1 1 1			
	 If there are fiel "Unsaved data 	ids that had beei a will be lost. Do	n filled in, system will pi you want to continue?"	rompt a n	nessage	
			•			

Insaved data will be lost. Do you want to continue?		
	YES	NO
	TES	NO

Figure 270: Unsaved Data Pop Up Message

- ii. If user click **YES**, system will discard all data that have entered by user and route back to previous page.
- iii. If user click **NO**, system will stay at current page

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	164

Y. Forget Password



Reset Password

1. On the Log In Page, locate the 'Forgot Password' Forgot Password' button and click it.



Figure 271: Login Page

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	165

2. System will display popup box to enter the NRIC/Passport No.

	×
User ID	
Please enter your user ID	
Please enter the NRIC/Passport number without any dashes or spaces for consultant	
	Submit



- 3. User need to fill in detail in required field and click
 - NRIC No (Malaysian)
 - Passport No (Non-Malaysian)
- 4. System will display a prompt message.



A verification link has been sent to ba****t1@yopmail.com. Please click the link provided to get started. If the email address is no longer in use, click change email address

CHANGE EMAIL ADDRESS

NO

Figure 273: Change Email Address Prompt Message

Submit

	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	166

- 5. Please review the registered email address displayed.
 - a. If the registered email address is correct, click No and proceed to verify the email and reset the password (continue with steps 6 to 10).
 - b. If you are unable to access the registered email address, please click on "Change email address" to update your new email. (continue at the "Email Change Request" section after step 10)
- 6. User need to check their email for the reset password link.

Reset Password	
Hello Nur Batrisyia Binti Azmie	
You have requested to reset your password	
Click (Here) to reset your password.	
Please proceed to login at:	
https://fcs-stg.fimm.com.my/	

Figure 274: Reset Password Link

- 7. Click '(Here)' to reset your password.
- 8. User will redirect to the Reset Password Page.



Figure 275: Reset Password Page

Finne Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	167

- 9. Enter details in required field. (Password must match to continue reset the password and met the password strength requirement)
 - Password
 - Confirm Password

10. Click	and user is able to login to FIMM System.

Email Change Request

On the Log In Page, locate the 'Forgot Password' Forgot Password' button and click it.

		🛓 Log In	🔓 Sign Up
		Please Lo	gin First
		LOG	IN
		User ID	
		Password	•
	-	Log	in
Click 'Forgot Password'		 Forgot Pa	ssword?
		First Tim	e Login
Click 'Forgot Password'		Forgot Pa	ssword? e Login

Figure 276: Login Page

2. System will display popup box to enter the NRIC/Passport No.

FERRENCE Managere Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	168

	×
User ID	
Please enter your user ID	
Please enter the NRIC/Passport number without any dashes or spaces for consultant	
	Submit

Figure 277: Forgot Password Pop Up Box

Submit

- 3. User need to fill in detail in required field and click
 - NRIC No (Malaysian)
 - Passport No (Non-Malaysian)
- 4. System will display a prompt message.



Figure 278: Change Email Address Prompt Message

5. Consultant clicks

CHANGE EMAIL ADDRESS

i. System will display email change request form to fill in with details:

button.

Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	169

- a. NRIC/Passport No (Auto populate based on registered NRIC/Passport No)
- b. New Email Address
- c. Selfie (Note: User need to take a selfie with NRIC / Passport. Please ensure the picture and details are clear.)

Email Change Request	×
NRIC / Passport No	
860707065678	
New Email Address	
Please enter your new Email	
Selfie *Take a selfie with your NRIC/Passport. Please ensure the picture and details are clear	
The screen capture will appear in this box.	
Subm	it

Figure 279: Email Change Request form

Consultant fills in the detail and click button. System will send the application to Distributor or FIMM for approval process.