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TO : i. UNIT TRUST MANAGEMENT COMPANIES (“UTMC”)
ii. INSTITUTIONAL UNIT TRUST ADVISERS (“IUTA”)
iii. CORPORATE UNIT TRUST ADVISERS (“CUTA”)

ATTN. : AUTHORISED REPRESENTATIVE / CHIEF EXECUTIVE OFFICER

EXEMPTION FROM COMPUTERISED UNIT TRUST EXAMINATION (“CUTE”)

Your attention is brought to FIMM’s circular dated 12 December 2014 (BR/AL/KHN-tlk/068-14) regarding the exemption from CUTE, in particular Item 4(a)(ii) of the circular.

Pursuant to the recent restructuring of the Certified Financial Planner (“CFP”) programme by Financial Planning Association of Malaysia (“FPAM”), please be informed that an individual who fulfils the following qualification may apply to FIMM for exemption from CUTE:

- a) Holder of CFP designation and a member of FPAM; or
- b) An associate member of FPAM who has successfully completed the CFP modules below:

Module 1: Foundation in Financial Planning and Tax Planning; and
Module 3: Investment Planning and Retirement Planning.

Notwithstanding the above, individual who has successfully completed the CFP modules based on the previous structure, i.e. Module 1: Foundation in Financial Planning, Module 4: Investment Planning and Module 5: Retirement Planning & Estate Planning may still apply to FIMM for exemption from CUTE.

The above exemption criteria is to take effect immediately.

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If you need further clarification on this matter, kindly contact Ms. Alin (ext: 326) or Ms. Valli (ext: 325) of Business Registration Department at 03-2093 2600.

Thank you.

Yours faithfully

Federation of Investment Managers Malaysia



Nazaruddin Othman
Chief Executive Officer

c.c. Puan Shamsul Bahriah Shamsudin
General Manager and Head
Institution Supervision Department
Market Supervision Division
Securities Commission Malaysia