



## CIRCULAR

Date:	30 September 2021	Ref No.:	CCD/IEWG/RMY-MMR/057-21
To:	ALL MEMBERS UTMC, IUTA, CUTA, PRS PROVIDER, IPRA AND CPRA		
Attn:	Chief Executive Officer/Authorised Representative		

### INVITATION TO PARTICIPATE AS INDUSTRY EDUCATION WORKING GROUP MEMBERS FOR THE DEVELOPMENT OF AN INDUSTRY EDUCATION AND MEDIA ENGAGEMENT PLAN

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As an SRO, FIMM is mandated to educate investors and promote public awareness on Unit Trust and Private Retirement Schemes industry. Over the years, we have been actively involved and participated in various investor education exhibitions and roadshows across the country and have collaborated with various strategic partners to educate the mass audience.

We are pleased to share some information on what we have done previously in terms of investor education. Kindly refer to the attached document for your reference.

In order to have a structured and holistic approach to industry education and media engagement plan, we are forming an Industry Education Working Group (IEWG) to help us in reaching out to the mass in the most efficient and effective manner.

The engagement plan shall include activities that are catered to the different market segments, such as school/university students, working young adults, young families, retirees, etc.

The main responsibilities of the IEWG are to guide FIMM mainly in the following areas:

1. To suggest/recommend on the type of industry education initiatives that will benefit the industry, which includes Consultants, investors and the public;
2. To provide input towards establishing a framework on investor education and awareness initiatives for an SRO; and
3. To explore common areas of interest where the plan can be executed in a collaborative manner.

We would like to invite you to nominate a representative from your esteemed organisation to be a member of this IEWG. Your contribution is invaluable to meet the objective of this working group.

If you are interested to be a member of the IEWG, kindly provide one (1) key representative and one (1) alternate representative for the IEWG and revert to us by **Monday, 4 October 2021**. You may register your participation as an IEWG member via the link below:

<https://forms.office.com/Pages/ResponsePage.aspx?id=uiLAp9fqFkGXyulq7rkYiyosySWdvoVHi81DD2On9TpUQ0dLODY0OVJRMEZLQjdYWFgwrDAXTjhGQS4u&wdLOR=c2CB32687-040C-481B-A329-8F4F7F8921BA>

(Cont'd)

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The first IEWG meeting is scheduled to be held on **Thursday, 7 October 2021** at **10:00am** via **MS Teams**. We will send the meeting invitation and link to MS Teams to all representatives via email in due course.

If you require further information or clarification, please contact the undersigned ([rosliza@fimm.com.my](mailto:rosliza@fimm.com.my)) or Mariesa Mohamed Ross ([mariesa@fimm.com.my](mailto:mariesa@fimm.com.my)) or Hilmann Yusoff ([hilmann@fimm.com.my](mailto:hilmann@fimm.com.my)).

Thank you.

Yours faithfully,



**Dr. Rosliza Mat Yatim**  
General Manager, Corporate Services Division

## INDUSTRY EDUCATION WORKING GROUP (IEWG)

<b>TERM OF REFERENCE FOR THE INDUSTRY EDUCATION WORKING GROUP</b>	
<b>Objective</b>	<p>The Industry Education Working Group (IEWG) is part of FIMM’s effort to develop a holistic and structured approach to industry education and media engagement plan ("the plan") for the industry.</p> <p>The plan aimed to provide a concerted effort in educating the industry and raising awareness among the investors on Unit Trusts (UTS) and Private Retirement Schemes (PRS).</p> <p>The plan will include activities catered to the different market segments within the UTS/PRS industry - enabling FIMM to execute the right type of engagement for each target audience.</p>
<b>The scope</b>	<p>The primary responsibilities of the IEWG are to guide FIMM mainly in the following areas:</p> <ol style="list-style-type: none"> <li>1. To suggest/recommend on the type of industry education initiatives that will benefit the respective market segments, including Consultants.</li> <li>2. To provide input towards establishing a framework on investor education and awareness initiatives for an SRO.</li> <li>3. To explore common areas of interest where the plan can be executed in a collaborative manner.</li> </ol>
<b>Deliverable</b>	Develop a 3-year Masterplan on Industry Education and Media Engagement
<b>Meeting frequency</b>	As and when necessary to develop the plan (Maximum of 4 times a year)
<b>Members</b>	Members and Distributors of UTS and PRS

## What we have done

(prior to 2018)

### A&P

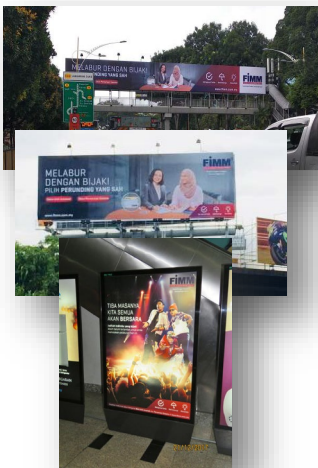
#### TV Commercials



#### Press ads



#### Out-of-Home



### Roadshows



Reached 5,700 people  
(2017-2018)

### Publication



## 2-year ops plan

### Digital campaign

Campaign reach on FB: **4.6 mil**  
Campaign engagement on FB: **65k**  
Video views on FB: **980k**

### Virtual InvestSmart Fest

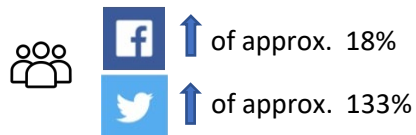
**1,063**  
visitors to the virtual booth

### Chaired

a panel session titled, "Unit Trust  
& PRS: Diversify and Demystify"

### Social Media

A total of **220** postings on  
Facebook and Twitter



### Capacity Building

**6,811**  
people were trained  
**126,488**  
Participants of CPD approved  
programmes

### FIMM e-Zine

**23,279**  
people have read the  
e-Zine

**5,908**  
Consultants claimed  
CPD points

### Roadshows

**27**  
Physical/Virtual  
sessions nationwide

**20** Public sessions  
**7** Uni sessions

Reached a total  
of **7,277**  
people

### FIMM TV

**7**  
videos developed  
**1,176**  
views

## Plans for 2021 – 2023

### Media Tie-Up

In 2021, collaborated with *TheSun Daily* for an educational campaign targeted to white collared professionals (potential reach of 200k readers/viewers).

This initiative will also be in 2022-2023 and will collaborate with other media titles.

### Digital initiatives



### Website revamp

To improve and enhance the overall user experience as well as establish a **one-stop resource centre** for Consultants, investors and the masses.

New website will be up Q1 2022 (est)

### BAU

- Participate in roadshows (virtually)
- University talks
- Life @ FIMM videos
- 2 issues of FIMM e-Zine