



## CIRCULAR

Date:	26 September 2024	Ref No.:	ID/ALL/HYF-TK-AZ/023-24 (Total no. of pages: 4)
To:	UTMC, IUTA, CUTA, PRS PROVIDER, IPRA AND CPRA		
Attn:	Authorised Representative/Chief Executive Officer		

### Request for Updated Information on Registered Consultants

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Dear Members/Distributors,

In our ongoing effort to maintain accurate and up-to-date records, we are conducting a review on FIMM-registered Consultants from all our Members/Distributors. We kindly seek your cooperation in providing the current number as at 31 August 2024, of registered Consultants across the following ranks within your agency structure, if applicable:

- Group Agency Manager
- Agency Manager
- Agency Supervisor
- Agent

Additionally, we request a breakdown of the registered Consultants within your organisation, categorised into the following areas:

- Sales/Marketing-related departments
- Investment-related departments
- Back Office-related departments
- Others

Please submit the requested information via the survey link below:

<https://survey.alchemer.com/s3/8029240/FIMM-Registered-Consultants-Information-Survey>

This will ensure consistency in the data provided. All information submitted will be treated with strict confidentiality and used solely for internal purposes to better understand the industry's Consultant landscape.

Should you require any further clarification or assistance, please do not hesitate to contact FIMM's Industry Development Department at [ID@fimm.com.my](mailto:ID@fimm.com.my).

We greatly appreciate your cooperation and timely response by the **deadline of 10 October 2024.**

Thank you for the support.

Yours faithfully

**FEDERATION OF INVESTMENT MANAGERS MALAYSIA**



**Heow Yen Fen**

**General Manager, Industry Services Division**

The survey questionnaire is outlined below.

## Section 1: Introduction

Please provide General Information as requested.

1. Name of Company:
2. Contact Person:
3. Designation:
4. E-mail:
5. Phone Number:

## Section 2: Agency

Registered Agencies with your Company.

6. Do you have registered Agencies with your company?  
 Yes  No

7. Please advise how many Agencies are registered with your company.

Please advise the number of UTS Consultants (for each tier) that you have as part of your Agency Structure.

8. Group Agency Manager (Kindly provide answers in numerical format only).

9. Agency Manager (Kindly provide answers in numerical format only).

10. Agency Supervisor (Kindly provide answers in numerical format only).

11. Agent (Kindly provide answers in numerical format only).

### Section 3: Internal Department Breakdown

We request a breakdown of the registered Consultants within your organisation, categorised into the following areas.

12. Sales/Marketing-related departments (Kindly provide answers in numerical format only).

13. Investment-related departments (Kindly provide answers in numerical format only).

14. Back Office-related departments (Kindly provide answers in numerical format only).

15. Others (Please specify).

### Section 4: Confirmation

16. Please confirm that the information provided is accurate to the best of your knowledge.

Yes  No

Thank you for taking our survey. Your response is very important to us.