

CIRCULAR

Date:	03 February 2025	Ref No.:	PDS/PRSFP/SNZ-SAR/003-25 (TOTAL NO. OF PAGES: 3)
To:	PRS PROVIDER, IPRA AND CPRA		
Attn:	Authorised Representative / Chief Executive Officer		

FIMM Private Retirement Scheme (PRS) Familiarisation Program 2025

1.0 Background

1.1 Since 2012, the Federation of Investment Managers Malaysia (FIMM) has conducted nine (9) rounds of the PRS Familiarisation Program (PRSFP), with the latest program held from 13 March 2024 until 12 September 2024 (“PRSFP 2024”).

1.2 Under the PRSFP, Qualified Persons such as Unit Trust Consultants and insurance/Takaful agents who meet FIMM’s criteria, are eligible to be register as PRS Consultants without having to pass the Computerised PRS Examination (CPRE). This exemption applies provided they have:

- Successfully completed a minimum 1.5-day familiarization program conducted by trainers certified by FIMM; and
- Passed the PRSFP quiz.

2.0 FIMM PRS Familiarization Program 2025 (PRSFP 2025)

2.1 In response to requests from Members and Distributors, FIMM will re-open the PRSFP from **03 March 2025 to 02 September 2025 (“PRSFP 2025”)**.

2.2 PRSFP 2025 is open to Qualified Persons who meet the following relevant experience and professional qualifications:

Qualified Persons	Eligibility Criteria
a) Unit Trust Consultant (UTC)	<ul style="list-style-type: none"> • Has at least 3 years' experience as a UTC as of 03 March 2025; • Registration status with FIMM is active; • Fulfils FIMM's fit and proper criteria; and • Obtained credits in any three (3) subjects in SPM or its equivalent.
b) Insurance Agent (IA)	<ul style="list-style-type: none"> • Has at least 3 years' experience as an insurance agent as of 03 March 2025; • Registration status with LIAM is active; • Fulfils FIMM's fit and proper criteria; • Obtained credits in any three (3) subjects in SPM or its equivalent; and • Holds one of the following certifications: <ul style="list-style-type: none"> ○ Passed the Certificate Examination in Investment-Linked Life Insurance (CEILLI); OR ○ Passed Takaful Basic Examination (TBE) Part A & Part C (issued from 2012 onwards); OR ○ Holds a Certificate from Malaysian Takaful Association (MTA) – General & Family (issued before 2012).
c) Staff of a Takaful Broker	<ul style="list-style-type: none"> • Holds a CMSRL for dealing in PRS; • Fulfils FIMM's fit and proper criteria; • Passed the relevant qualifying examination; and • Obtained credits in any three (3) subjects in SPM or its equivalent.

2.3 Trainers certified by FIMM in PRSFP from the years 2018 to 2024 are allowed to conduct PRSFP 2025 for Qualified Persons.

- 2.4 The procedures and administrative requirements for conducting PRSFP 2025, including identification, verification, attendance checking, and issuance of certificates of attendance remain status quo.
- 2.7 Proof of attendance for PRSFP 2025 is valid up to **30 September 2025** for the purpose of registration with FIMM as a PRS Consultant. FIMM will not entertain any request on extension beyond this date.
- 2.8 Qualified Persons with proof of attendance to PRSFP 2025 but fail to register with FIMM on or before the above expiry date of 30 September 2025 is required to take and pass the CPRE in order to be registered as a PRS Consultant.
- 2.8 For further details, please refer to the *Administrative and Procedural Requirements for Conducting FIMM PRS Familiarization Program 2025* for further details, attached with this circular.
- 2.9 All Members and Distributors conducting the PRSFP 2025 must use the presentation slides prepared by FIMM.

Should you require further information or clarification, please contact:

- a) Pn. Khairul Shafinas at 03-7890 4242 (ext 432), shafinas@fimm.com.my
- b) Pn. Syifa Ardani at 03-7890 4242 (ext 434), syifa@fimm.com.my

Thank you.

Yours faithfully,


SHAHRUL NIZAM ZAINOL

Senior Manager

Professional Development & Services Department

FIMM PRIVATE RETIREMENT SCHEME FAMILIARIZATION PROGRAMME 2025
(PRSFP 2025)

Administrative and Procedural Requirements

(Effective Date: 03 March 2025 – 02 September 2025)

(A) Background and Objectives

1. To be eligible to market and distribute PRS, an individual must take and pass PRS Examination (CPRE) and be registered with Federation of Investment Managers Malaysia (FIMM) as a PRS Consultant.
2. As part of the initiative to enhance recruitment of PRS Consultants, FIMM has in year 2012, 2014, 2018, 2019, 2020, 2021, 2022, 2023 and 2024 introduced PRS Familiarisation Programme to allow Qualified Persons with relevant experience and professional qualifications to be exempted from taking CPRE.
3. Under the PRSFP 2025, the requirements for Qualified Persons are set out as below:

Qualified Persons	Conditions
a) Unit Trust Consultant (UTC)	<ul style="list-style-type: none">• Has at least 3 years' experience as a UTC as of 03 March 2025;• Registration status with FIMM is active;• Fulfills FIMM's fit and proper criteria; and• Obtained credits in any three (3) subjects in SPM or its equivalent.
b) Insurance Agent (IA)	<ul style="list-style-type: none">• Has at least 3 years' experience an insurance agent as of on 03 March 2025;• Registration status with LIAM is active;• Fulfills FIMM's fit and proper criteria;• Obtained credits in any three (3) subjects in SPM or its equivalent; and• Holds one of the following certifications:<ul style="list-style-type: none">○ Passed the Certificate Examination in Investment-Linked Life Insurance (CEILLI); OR○ Passed Takaful Basic Examination (TBE) Part A & Part C (issued from 2012 onwards); OR○ Holds a Certificate from Malaysian Takaful Association (MTA) – General & Family (issued before 2012)
c) Staff of Takaful Broker	<ul style="list-style-type: none">• Possess the CMSRL for dealing in PRS;• Fulfills FIMM's fit and proper criteria;• Passed the relevant qualifying examination; and• Obtained credits in any three (3) subjects in SPM or its equivalent.

(B) PRSFP 2025

Key Learning Objectives

1. PRSFP 2025 aims to equip Qualified Persons with the fundamental understanding of PRS, that include:
 - a) Introduction to the PRS Industry;
 - b) Regulatory framework;
 - c) PRS Provider;
 - d) Features of PRS;
 - e) Constitution of PRS;
 - f) PRS investments; and
 - g) PRS distributors and consultants.

Training Duration

2. Minimum 1.5 days.

Should the training need to be conducted for a Qualified Person in many sessions across multiple days, trainers are required to ensure the participant's attention and overall learning outcomes for each session are effectively maintained and achieved. For avoidance of doubt, training conducted in less than 1.5 days is not permitted.

PRSFP Quiz

3. All Qualified Person must pass the PRSFP Quiz after completing the training session. PRSFP Quiz is administered by FIMM.
4. Details of PRSFP Quiz are as follows:

Details	Remarks
1. Passing mark	80%
2. Duration of PRSFP Quiz	30 minutes
3. Number of questions	20 multiple choice questions
4. Number of attempts	Maximum of 3 times

5. Qualified Persons who fail all three (3) attempts must resit the training.
6. Relevant Distributors are required to contact FIMM representatives stated under item C (3) to arrange for the PRSFP Quiz.

Training Methodology

7. Training sessions can be conducted as classroom training (face-to-face) or via online/virtual training using any suitable online/virtual meeting platform.

8. For online/virtual training, trainees must be present at all times and the training duration requirement must be complied accordingly.

Certification of Trainers

9. PRSFP 2025 must be conducted by trainers who have been certified by FIMM.
10. Certified trainers must have attended PRS Train-the-Trainer (TTT) programme or PRS Refresher programme organised by FIMM.
11. Trainers who have been certified by FIMM for PRSFP held in years 2018 to 2024 are allowed to conduct PRSFP 2025.

Training Materials

8. The training must cover the slides provided by FIMM. Over and above that, trainers may develop more material for their training that could enhance learning experience and outcome among participants.
9. The slides should be given to participants as part of the learning material. It can be in the form of hardcopy notes or softcopy or any other form that is suitable.

Class Size

10. The maximum number of participants for each training session is limited to 100 pax. This is to ensure the effectiveness of the training. However, trainers are advised to exercise their discretion to ensure that all participants pay attention during the training.

Program Ending Date

11. Certified trainers are allowed to conduct the PRSFP 2025 as frequently as practicable up to **02 September 2025** (Program Ending Date). Subsequently, PRSFP 2025 will cease. Qualified Persons who failed to complete PRSFP 2025 before the Program Ending Date are required to sit and pass CPRE in order to be registered as a PRS Consultant.

Proof of Attendance: Validity Period

12. Once the Qualified Persons have attended the program, they are allowed to be registered with FIMM as PRS Consultants without taking CPRE.
13. Proof of attendance for the programme is valid up to **30 September 2025** for the purpose of registration with FIMM as a PRS Consultant.
14. Qualified Persons with proof of attendance to the programme and passed PRSFP quiz but fail to be registered with FIMM on or before the above expiry date are required to take and pass the CPRE in order to be registered as a PRS Consultant.

(C) Responsibilities and Administrative Requirements

General

1. PRS Providers, Institutional PRS Advisers and Corporate PRS Advisers (collectively referred to as “Relevant Distributor”) are required to nominate a person-in-charge for the conduct of the PRSFP 2025 (PRSFP Liaison).
2. PRSFP Liaison will be the main contact person between the Relevant Distributor and FIMM pertaining to the conduct of PRSFP 2025.
3. Relevant Distributor must provide the name, telephone, fax number, and the email address of the PRSFP Liaison to the following:
 - a) Ms Khairul Shafinas Muslim (shafinas@fimm.com.my) and
 - b) Ms Syifa Ardani Roslan (syifa@fimm.com.my)
4. The Relevant Distributor must ensure that only trainers certified by FIMM are allowed to conduct PRSFP 2025.

Attendance List

5. Trainers are required to use the Attendance List (Appendix 1) to record participants’ attendance at the PRSFP 2025. The Attendance List is **ONLY** for Qualified Persons, whereas other types of participants are to use a separate attendance list.

a) Identity verification prior to signing-in

Before the start of a training session, Qualified Persons are required to produce identification documents such as NRIC or passport for identity verification purpose. Trainers and/ or assistants will check and ensure that the name, and NRIC number are the same as printed on the Attendance List as well as the photograph on the identification document matches that of the bearer, before allowing the Qualified Persons to put their signatures (sign-in) at the prescribed column of the Attendance List.

b) Hard-close rule for registration

Registration or “signing in” for a session will be closed an hour after the scheduled training’s starting time. Qualified Persons who fail to report to the trainers/ assistants before the closing time will be deemed absent with the relevant column in the Attendance List duly marked “absent”.

c) Signing out

- i. Qualified Persons are only allowed to sign out after the session has ended.
- ii. Before signing out, Qualified Persons must produce identification documents such as NRIC or passport for identity verification purpose. Trainers and/or assistants will check

and ensure that the name, and NRIC number are the same as printed on the Attendance List as well as the photograph on the identification document matches that of the bearer, before allowing the Qualified Persons to put their signatures (sign-out) at the prescribed column of the Attendance List.

- iii. Failure to sign out will not be considered as full attendance.
- iv. For any sessions with larger group of participants, trainers and/ or assistants must ensure that the participants are properly managed for a smooth and orderly signing-out.

d) Reporting of irregularities

All irregularities, including typo errors on the name and/ or NRIC or passport number of the participants as printed on the Attendance List must be reported on the Attendance List and supported by relevant documents, for example, photocopy of identification document.

6. Completed Attendance List **MUST** be returned to the PRSFP Liaison.

- a) Once signed off by trainer and/ or assistant, the original copy of the completed Attendance List shall be returned to the PFP Liaison as mentioned in Section 3, Part (C) above.
- b) The original completed Attendance List will be kept by the Relevant Distributor.
- c) The Relevant Distributor must ensure that all identity and attendance related information (including signatures) captured on the Attendance List is complete and correct. The Certificate of Attendance as well as reporting requirements are expected to be issued and prepared based on the information recorded therein.

Full Attendance is Required as Proof of Attendance

- 7. Only full attendance or attendance to all relevant sessions that covered all learning objectives/ outcomes under the PRSFP 2025 will be recognised by FIMM as proof of attendance for the purpose of registration as PRS Consultants.

Certificate of Attendance

- 8. The Relevant Distributor must provide a Certificate of Attendance to Qualified Persons who have successfully completed the PRSFP 2025, in the form and manner specified in Appendix 2.
- 9. Only Qualified Persons with full attendance and who have passed PRSFP Quiz will be issued a Certificate of Attendance. The Certificate must be signed by the Trainer(s) who conducted the program or by the Head of Training Department of the Relevant Distributor.
- 10. For the purpose of registration with FIMM as PRS Consultants, a **certified true copy** of the Certificate of Attendance and result of the PRSFP quiz is required as proof of attendance and passing PRSFP quiz to the PRSFP 2025.

Report Submission to FIMM

11. Relevant Distributor is required to prepare and forward to FIMM the completed report on the PRSFP 2025 conducted. The format of the report and the cover letter are enclosed as Appendix 3.
12. The report should be submitted to FIMM monthly, i.e. by 15th of the following month. The report should cover all training sessions conducted by the Relevant Distributor during the reporting month.
13. The first report is due for submission to FIMM on **15 April 2025** and must cover all training sessions conducted by the Relevant Distributor on or before **31 March 2025**.
14. The Relevant Distributor is also required to submit the Training Notification Report as specified in Appendix 4 to FIMM at least **1 week** before the training dates. Failing to comply with this requirement will result in FIMM not recognising the said training session under PRSFP 2025.
15. FIMM reserves the right to conduct spot checks.

Others

16. All relevant records, including the original completed Attendance List must be maintained and made available for checking and audit verification purposes.
17. The Relevant Distributor must ensure compliance in submitting the registration application to FIMM as per FIMM's Consolidated Rules and Registration Manual's requirements.
18. The Relevant Distributor must submit clear copy of CELLI, TBE or MTA Certificate with stamped declaration signed by the relevant personnel as below:

We hereby confirm the certificate holder has at least 3 years' experience as an *Insurance/Takaful agent.

<signature>

Name :

Designation :

Company :

* Relevant Distributor may circle whichever is relevant before putting on the signature.

19. FIMM is not responsible for any unsuccessful registration due to non-compliance of registration requirement(s) and no refund of registration fees will be made due to non-compliance of registration requirement(s).

Private Retirement Scheme (PRS)-PRS Familiarization Program Attendance List

(A) Details on the training:

1. Venue:
2. Date:
3. Duration: from to
4. PRS subjects covered in the training: (pls mark "x" in the box, where applicable)
- | | |
|---|---|
| <input type="checkbox"/> A Introduction to the PRS industry | <input type="checkbox"/> C PRS Provider |
| <input type="checkbox"/> B Regulatory Framework | <input type="checkbox"/> D Features of PRS |
| | <input type="checkbox"/> E Constitution of PRS |
| | <input type="checkbox"/> F PRS investments |
| | <input type="checkbox"/> G PRS distributors & consultants |

I hereby certify that:

- (a) I am a trainer certified by FIMM for conducting PRS Familiarization Program;
- (b) I have conducted the PRS Familiarization Program, at the above scheduled date, venue and time/ duration; and
- (c) the training covered the above subjects and was delivered based on the slides provided by the FIMM.

(B) Attendance monitoring/ identity verification/ session administration:

I hereby certify that:

- (a) I have checked each participant's name and identification no. (NRIC/ Passport) printed on his/ her identification document (NRIC/ Passport) are the same with those printed on this Attendance List. Any irregularity on the above were reported with supporting document, where relevant;
- (b) all participants that reported for registration before the cut-off time have signed-in;
- (c) late participants were barred from signing-in and duly crossed or marked "absent" in their attendance;
- (d) signing-out by participants are done after training ended. I have verified participants' name and identification no. against their identification document before they sign-out.
- (e) the overall attendance for this session is summarised as follows:
- | | |
|-------------------------|------------|
| (i) Total Attended: | () |
| (ii) Total Absent: | () |
| (iii) Total Registered: | () |

Name and (NRIC)	Date	Signature
Remarks:		<div style="border: 1px solid black; padding: 5px; width: 80px; margin: 0 auto;">Company stamp</div>

Trainer Name and (NRIC)	Date	Signature
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No.	Company	Name	NRIC	Signature (Day 1)		Signature (Day 2)	
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Appendix 1

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Private Retirement Scheme (PRS)-PRS Familiarization Program Attendance List

(A) Details on the training:

1. Venue: Training Room 1, PJ Office

2. Date: 20 & 21 March 2024

3. Duration: from 9.00 am to 5.00 pm

4. PRS subjects covered in the training: (pls mark "x" in the box, where applicable)

- ☒ Introduction to the PRS industry
☒ Regulatory Framework

I hereby certify that:

- (a) I am a trainer certified by SIDC/ SC for conducting PRS Familiarization Program;
 (b) I have conducted the PRS Familiarization Program, at the above scheduled date, venue and time/ duration; and
 (c) the training covered the above subjects and was delivered based on the slides provided by the SIDC/ SC.

Chan Chin Chen
 (861212-10-2888)

21 March 2024

Trainer Name and (NRIC)

Date

Signature

4. PRS subjects covered in the training (cont'd):

- ☒ PRS Provider
☒ Features of PRS
☐ Constitution of PRS
☐ PRS investments
☐ PRS distributors & consultants

(B) Attendance monitoring/ identity verification/ session administration:

I hereby certify that:

- (a) I have checked each participant's name and identification no. (NRIC/ Passport) printed on his/ her identification document (NRIC/ Passport) are the same with those printed on this Attendance List. Any irregularity on the above were reported with supporting document, where relevant;
 (b) all participants that reported for registration before the cut-off time have signed-in;
 (c) late participants were barred from signing-in and duly crossed or marked "absent" in their attendance;
 (d) signing-out by participants are done after training ended. I have verified participants' name and identification no. against their identification document before they sign-out.
 (e) the overall attendance for this session is summarised as follows:

(i) Total Attended: (2)
 (ii) Total Absent: (1)
 (iii) Total Registered: (3)

Agnes Mo (871210-10-283)

21 March 2024

Name and (NRIC)

Date

Signature

Remarks:

- (1) FIMM No. for Pepsi Koh should be 06-0-00100
 (2) EthanHo came at 11.30 am, hence considered absence



No.	Company	Name	NRIC	Signature (Day 1)		Signature (Day 2)	
				In	Out	In	Out
1	SUPER INVESTMENT MANAGEMENT BERHAD	MOHD RAHMAT BIN SAIFUL	781223-10-2233	MOHD RAHMAT	MOHD RAHMAT	MOHD RAHMAT	MOHD RAHMAT
2	SUPER INVESTMENT MANAGEMENT BERHAD	PEPSI KOH LA	800102-08-1122	PEPSIK	PEPSIK	PEPSIK	PEPSIK
3	SUPER INVESTMENT MANAGEMENT BERHAD	ETHAN HO	780210-08-2211	ETHAN HO	ETHAN HO		
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EXAMPLE

Appendix 1

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Super Investment Management Bhd
(12345-X)

CERTIFICATE OF ATTENDANCE

This is to confirm that

Mohd Rahmat Bin Saiful

bearing identification document with the following number

781223-10-2233

has successfully completed

**Private Retirement Scheme
Familiarization Program**

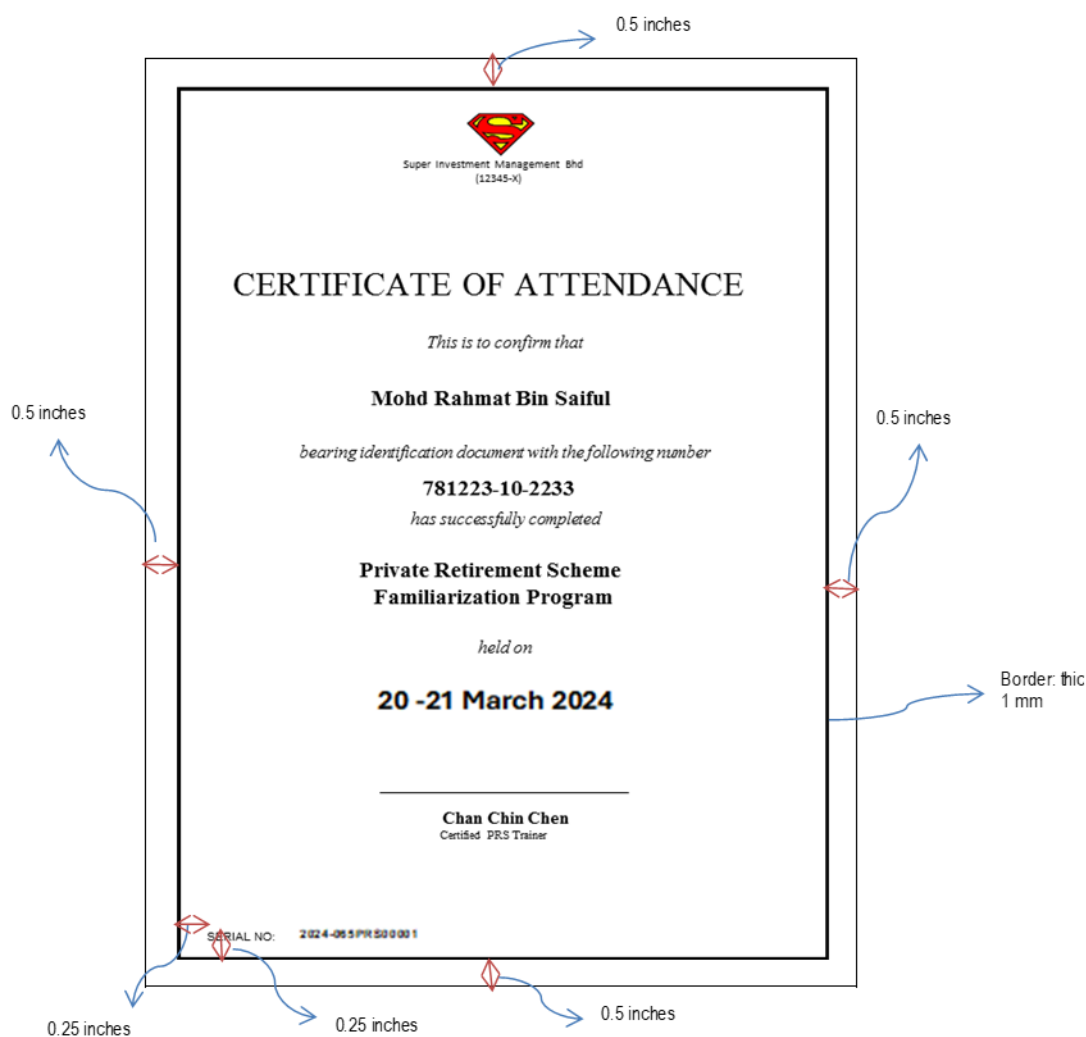
held on

20 - 21 March 2024

Chan Chin Chen
Certified PRS Trainer

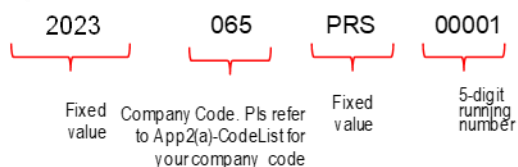
SERIAL NO: 2024-065PRS00001

Specification:



Notes:

- 1 Paper (a) quality: 100 gsm (b) colour: beige (c) Size: A4
- 2 Margin: 0.5 inches
- 3 Fonts: (a) Colour: black (b) Type face: Times New Roman (Except serial no), (c) Size: various font
Pls refer to the attached MSExcels file for respective font sizes.
- 4 Serial No: (a) font size: Arial 12 (b) Margin from borders: 0.25 inches (c) format:



- 5 Border: (a) Colour: Black (b) Thickness: 1 mm.

PRS Familiarization Program 2025

Company Code

Date Updated: 31 January 2025

Note: As and when there is/are new organisation(s) joining the industry, the list will be updated and relevant company will be notified accordingly

PRS DISTRIBUTOR AS AT 31 JANUARY 2025

NO.	PRP	CODE NO.
1	AHAM ASSET MANAGEMENT BERHAD (formerly known as AFFIN HWANG ASSET MANAGEMENT BERHAD)	038
2	AIA PENSION AND ASSET MANAGEMENT SDN. BHD.	065
3	AMFUNDS MANAGEMENT BERHAD	002
4	HONG LEONG ASSET MANAGEMENT BHD	016
5	MANULIFE INVESTMENT MANAGEMENT (M) BERHAD	058
6	PRINCIPAL ASSET MANAGEMENT BERHAD	031
7	PUBLIC MUTUAL BERHAD	009
8	RHB ASSET MANAGEMENT SDN BHD	054
NO.	IPRA	CODE NO.
1	AFFIN BANK BERHAD	523
2	AMBANK (M) BERHAD	534
3	BANK MUAMALAT MALAYSIA BERHAD	556
4	CIMB BANK BERHAD	510
5	IFAST CAPITAL SDN BHD	301
6	KENANGA INVESTMENT BANK BERHAD	553
7	PHILLIP MUTUAL BERHAD	043
8	PUBLIC BANK BERHAD	547
9	RHB BANK BERHAD	516
10	TA INVESTMENT MANAGEMENT BERHAD	027
11	UOB KAY HIAN SECURITIES (M) SDN BHD	567
NO.	CPRA	CODE NO.
1	A.D. FINANCIAL SDN. BHD.	704
2	ALPINE ADVISORY SDN BHD	721
3	BILL MORRISONS WEALTH MANAGEMENT SDN. BHD.	714
4	CC ADVISORY SDN BHD	715
5	EXCELLENTTE CONSULTANCY SDN BHD	712
6	FA ADVISORY SDN. BHD.	710
7	FIN FREEDOM SDN BHD	702
8	FINWEALTH MANAGEMENT SDN BHD	718
9	M ADVISORY SOLUTIONS SDN BHD (formerly known as GENEXUS ADVISORY SDN BHD)	713
10	HARVESTON WEALTH MANAGEMENT SDN. BHD.	705
11	LEGACY ADVISORY SDN BHD	707
12	MAGNISAVE GROUP SDN BHD	716
13	MELBOURNE CAPITAL GROUP SDN BHD (formerly known as BLUEPRINT PLANNING SDN BHD)	709
14	REDVEST WEALTH & ASSET MANAGEMENT SDN. BHD.	723
15	RESOLUTE PLANNING SDN BHD	726
16	UNO ADVISERS SDN BHD	724
17	UOB KAY HIAN WEALTH ADVISORS SDN BHD	720
18	VKA WEALTH PLANNERS SDN BHD	708
19	WEALTH VANTAGE ADVISORY SDN. BHD.	717
20	WHITMAN INDEPENDENT ADVISORS SDN BHD	703
21	YES FINANCIAL BERHAD	719

Appendix 2

NO.	PRP + IPRA	CODE NO.
1	KENANGA INVESTORS BERHAD	022

PRS Familiarization Program**Monthly Report**

To: Federation of Investment Managers Malaysia
 c/o Professional Development & Services Department
 19-06-1, 6th Floor, Wisma Tune, No. 19, Lorong Dungun, Damansara Heights
 50490 Kuala Lumpur
 Tel: 03-7890 4242
 email: shafinas@fimm.com.my syifa@fimm.com.my

Monthly report must be submitted to FIMM on or before **15th of the following month**

(Please select where applicable)

☐ We have not conducted any PRS Familiarization Program for the month/ period ended [please put in date];

or

☐ We have conducted PRS Familiarisation Program during the month/ period ended [please put in date].
 Enclosed please find the completed report. The softcopy of the report [Appendix 3(a)] in MS Excel will be
 emailed to FIMM today.

Please contact the undersigned*/ following personnel* if you require any further clarification on the report.

Name:		
Designation:		
Email:		
Tel No:		Fax No:

(* strike wherever is not applicable)

From:

Name:		
Name of company:		
Designation:		
Tel No:		Fax No:
Date:	Signature:	

Appendix 3(a)

Appendix 3(a)

Private Retirement Scheme (PRS)
 PRS Familiarization Program
 Monthly Report for the Month Ended _____

No.	Date	Venue	Name of Trainer	NRIC of Trainer	Training time	Subject A	Subject B	Subject C	Subject D	Subject E	Subject F	Subject G	Company	Name	NRIC	FIMM No	Mobile No	Date joined FIMM	Attendance Status	Certificate of Attendance (Serial No)
--	a) Training date b) DD-MMM-YYYY	location where the training was conducted	a) Full Name as per NRIC b) In capital letters	a) As per NRIC b) xxxxxxx-xx-xxxx	a) As reported in Attendance List b) in 24 hrs. format	(a) Referring to key learning objectives of the program as follows: --Subject A: Introduction to the PRS industry --Subject B: Regulatory Framework --Subject C: PRS Provider --Subject D: Features of PRS --Subject E: Constitution of PRS --Subject F: PRS investments --Subject G: PRS distributors & consultants (b) "1" = Subject covered "NA" for not applicable.							Name of the Relevant Company	a) Full name of UTC/ Qualified Persons as per NRIC b) In capital letters	a) 'xxxxxx-xx-xxxx' b) "NA" if not applicable	a) UTC's FIMM No b) "NA" if not applicable	a) xxx-xxxxxxx b) "NA" if not applicable	DD-MMM-YYYY	"P"=Present "A"=Absent	a) 2018-XXXPRSXXXX b) Pls refer to Appendix 2 for more info on serial no.
0	20 & 21 March 2024	Training Room 1, PJ Office	CHAN CHIN CHEN	861212-10-2888	09:00 to 17:00	1	1	1	1	1	1	1	SUPER INVESTMENT MANAGEMENT BHD	MOHD RAHMAT BIN SAIFUL	781223-10-2233	065-S-00032	012-1234567	24-Jul-2008	P	2018-065PRS00001
0	20 & 21 March 2024	Training Room 1, PJ Office	CHAN CHIN CHEN	861212-10-2888	09:00 to 17:00	1	1	1	1	1	1	1	SUPER INVESTMENT MANAGEMENT BHD	PEPSI KOH LA	800102-08-1184	065-0-00100	019-7654321	24-Aug-2008	P	2018-065PRS00002
0	20 & 21 March 2024	Training Room 1, PJ Office	CHAN CHIN CHEN	861212-10-2888	09:00 to 17:00	1	1	1	1	1	1	1	SUPER INVESTMENT MANAGEMENT BHD	ETHAN HO	7800210-08-2211	065-0-00113	013-1332363	1-Aug-2006	A	NA
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(Blue) Explanation on the field as well as specification/ format

(Green) Examples

(White) Data entry area. Pls add more rows if the space provided is insufficient

Note: Training notification to be submitted to FIMM 1 week before the training date(s). email: shafinas@fimm@com.my syifa@fimm.com.my

Date: 13-Mar-24

DRAFT

FIMM PRIVATE RETIREMENT SCHEME FAMILIARIZATION PROGRAM
(PRSFP 2025)

Frequently Asked Questions (FAQs)

- 1. Can individuals who are not Qualified Persons attend the training/PRS Familiarization Program (PRSFP)?**

Yes, such persons can attend the PRSFP to acquire knowledge or to collect CPD points. However, a separate attendance list is required to be maintained for such persons. Their attendance is not required to be submitted/reported to FIMM under PRSFP.

- 2. How many CPD points will be awarded to PRSFP?**

8 CPD points.

- 3. Are the CPD points collected from attending the PRSFP be recognised for both Unit Trust Consultants (UTSC) and Private Retirement Scheme Consultants (PRSC)?**

Yes.

- 4. Can a Qualified Person with Attendance Certificate issued by Company A choose to be registered as PRSC with Company B?**

The above is permitted.

- 5. How we determine whether a UTSC fulfils the criteria of “3-year experience”?**

The above 3-year period is calculated from the date the UTSC joined the industry until 03 March 2025. The joining date of UTSC is accessible by Relevant Company via FIMM system (i3 System). Please click Report – Authorised UTC Download. Please refer the joined date in the column of “Joined Date (Industry)”

For insurance/Takaful agents, the date he/she passed the qualifying examination (CEILLI examination or Takaful examination) will be used as the basis to calculate number of years the persons have been with the industry.

6. Is participation in the PRSFP Quiz compulsory?

Yes, participation in the PRSFP quiz is compulsory. All qualified persons must pass the PRSFP quiz after completing the training session. PRSFP Quiz is administered by FIMM.

7. What is the passing score for consultants in this PRSFP Quiz?

The minimum passing score for the PRSFP Quiz is 80%.

8. How long is the duration of the PRSFP Quiz?

The time limit for the PRSFP Quiz is 30 minutes.

9. What is the typical format of the PRSFP Quiz, including the number of questions and types of questions asked?

The PRSFP Quiz consists of 20 multiple-choice questions.

10. How many maximum attempts are allowed for the PRSFP Quiz?

You are allowed to take the PRSFP Quiz a maximum of 3 times. If you don't pass after 3 attempts, you'll need to retake the training before being eligible to attempt the quiz again.

11. How do I register for the PRSFP Quiz?

Distributors may contact FIMM PRSFP 2025's representatives (stated under item C (3) to arrange for PRSFP Quiz.

12. How far in advance do I need to register for the FIMM PRSFP 2025 Quiz?

FIMM PRSFP 2025 Quiz registration should be made 3 days before the scheduled quiz date.

13. When should Proof of Attendance-Validity Period of the program be submitted?

Proof of attendance of the programme must be submitted no later than 30 September 2025 to allow registration of the person as a PRS Consultant with FIMM.

14. Can a Relevant Company outsource/engage third-party trainer(s) to conduct PRSFP for their Qualified Persons?

Yes, provided that the Relevant Company:

- a) ensures that the third-party trainer must be a FIMM certified trainer for the purpose of conducting PRSFP for 2025; and
- b) discharges/fulfils responsibilities and administrative requirements accorded to Relevant Company as stipulated in Section (C) of the Administrative and Procedural Requirements for PRSFP 2025, including issuance of the Certificate of Attendance under its company logo.

15. What number should I put in for FIMM Number in the 2025 PRSFP: Train-the-Trainers Program and Refresher Course Registration Form?

PRSC Registration Number. Kindly put “NA” for participants that are not a registered PRSC.

16. Can a Relevant Company register a trainer to FIMM TTT program, if he/she will only join the company after the TTT session?

Yes. The Relevant Company may do so.

17. I have experienced trainers who hold other professional qualifications but are neither UTC nor PRC. Can they join the upcoming TTT session in order to be certified as trainers for PRSFP?

Yes. They are allowed to do so as long as the Relevant Company can ensure that the trainers have the relevant skills, knowledge and experience in conducting the PRSFP. Additionally, Relevant Company must ensure that such trainers had fulfilled the annual FIMM CPD requirements for PRC.

18. Is there any requirements in minimum number of years in training for attending the TTT session?

No minimum number of years in training is needed as long as the Relevant Company can ensure that the trainers have the relevant skills, knowledge and experience in conducting the PRSFP. Additionally, Relevant Company must ensure that such trainers had fulfilled the annual FIMM CPD requirements for PRC.