

IFP M6 Trainer - 12/4/08 - Topics 3, 4 & 5

Salam to you.

Dear Aziz,

Our telephone conversation previously is kindly referred to.

FYI, our first batch of IFP students will start their Module 6 in April. 70 qualified students have signed up, of which 25 are non-Muslim, and we would appreciate if you can consider being the IFP Trainer for this session:

Date: Saturday, 12/4/08

Venue: IBFIM training center, 4th floor, Dataran Kewangan Darul Takaful

Time: 2.00 pm to 5.15 pm

The syllabus:

FUNDAMENTAL FINANCIAL PLANNING PRACTICES & COMPETENCIES	
3.0 Establishing Relationship with the Client 3.1 Understanding Client's Needs in the Context of Shariah 3.2 Reasons Why the Client is Approaching an Islamic Financial Planner 3.3 The Financial and Non-Financial Considerations of an Islamic Financial Plan 3.4 Discovering Undetected and Undisclosed Obligations that Clients May Have	2.00 pm – 2.45 pm
4.0 Process of Data Gathering 4.1 Scope and Objectives of Data Gathering Process 4.2 The Legal and Shariah Aspects of Knowing Your Client 4.3 Assessment of Compliance 4.4 Vital Elements and Components of Client's Data Sheets	2.45 pm – 3.30 pm
5.0 Financial Analysis of Client's Data 5.1 Determining Client's Objectives vis-a-vis Shariah Guidelines 5.2 Assessing Client's Risk Profile 5.3 Presenting Client's Current Financial Standing 5.4 Identifying Surplus and/or Shortfall in the Client's Financial Position	3.45 pm – 5.15 pm

The above syllabus is still open for discussion and we certainly welcome your input, and would be happy to pay you a visit to discuss. We have a fee scheme for the IFP Trainers and for the half day session above, the total is RM1,100.00.

The salients terms are as follow:

1. Fees (Full day)

Academic Level	Basic fee	Professional qualifications	Work experience of 15 years minimum
Bachelor	2,000	+ 100	+ 100
Master	2,100	+ 100	+ 100
Doctorate	2,200	+ 100	+ 100

2. Teaching materials

i. Powerpoint slides

Trainer has to prepare a set of Powerpoint slides presentation based on the syllabus supplied. The softcopy of the presentation should be emailed to mahadzir@fpam.org.my and jamil@ibfim.com at least two (2) weeks before the class lecture.

ii. Study Questions

Trainer has to submit 2 sets of question and answer for each topic of the syllabus provided. For example, in a full day training, the Trainer is responsible for a total of 4 topics that has 4 sub-topics in each slot. Thus, Trainer has to submit a total of 32 sets of question and answer (4 topic x 4 sub-topics x 2 Q&A).

Pls do not hesitate to call me at 012 206 1918 if you need further explanation. For more info on our IFP program, click here: <http://www.fpam.org.my/index.php?fuseaction=ifp.main>

We look forward to your reply to confirm your availability and willingness to teach.

Regards,

Mahadzir Ahmad

Manager for Islamic Financial Planner (IFP) program

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