



Islamic Financial Planner – Challenge Status (IFP-CS) Shariah, Islamic Financial Plan Construction and Professional Responsibilities (IWM3021)



A	Challenge Status	1 st Intake	Training - 21 st - 22 nd Jan, 11 th - 12 th Feb, 10 th - 11 th Mar, 1 st Apr	Assessment - 14 th - 15 th Apr	*Fee RM2 600 *subject to 6% SST include assessment fee
		2 nd Intake	Training - 8 th - 9 th , 23 rd - 24 th Jun, 8 th - 9 th , & 28 th Jul	Assessment - 11 th - 12 th Aug	

About the programme

This module is designed to prepare candidates to become a competent financial planner capable of meeting the financial needs of the clients in conformity to Shariah. Candidates are provided with relevant Shariah and regulatory frameworks, systematic processes, technical knowledge, skills and tools necessary to develop a comprehensive Islamic financial plan and able to deliver advisory services to clients. Plan construction and case studies will cover the key Islamic financial planning components consisting of cash flow and liability management, risk management and Takaful, Islamic investment, Zakah and tax, retirement, Islamic estate and Waqf. Candidates will also be able to practice the ethics and professional responsibilities of an Islamic financial planner.

Learning outcomes

- Illustrate the Shariah principles and applications related to Islamic finance
- Explain the financial planning industry and its regulatory structure
- Realize the steps and requirement in Islamic financial planning process
- Construct and strategize a holistic Islamic financial plan
- Formulate and execute implementation and review process of the plan as an ongoing advisory service

Learning topics

- ▶ **Topic 1:** Introduction to Shariah and Fiqh
- ▶ **Topic 2:** Rule-Making Process in Islamic Law (Ijtihad)
- ▶ **Topic 3:** Overview of Fiqh al- Muamalat al-Maliyyah
- ▶ **Topic 4:** The Main Theories of Muamalat Contracts
- ▶ **Topic 5:** Permissible Contracts in Islam
- ▶ **Topic 6:** Concepts of Financial Planning From Shariah Perspectives
- ▶ **Topic 7:** Introduction of Financial Planning and Financial Planning Industry
- ▶ **Topic 8:** Basics of Islamic Financial Planning
- ▶ **Topic 9:** Putting Ethical Values into Practice
- ▶ **Topic 10:** Financial Plan Construction (E-G-A)
- ▶ **Topic 11:** Islamic Financial Solution Formulation (D) - Cash Flow and Asset-Liability Management
- ▶ **Topic 12:** Islamic Financial Solution Formulation (D) –Islamic Risk Management
- ▶ **Topic 13:** Islamic Financial Solution Formulation (D) - Islamic Investment
- ▶ **Topic 14:** Islamic Financial Solution Formulation (D) - Retirement
- ▶ **Topic 15:** Islamic Financial Solution Formulation (D) - Zakah and Income Tax
- ▶ **Topic 16:** Islamic Financial Solution Formulation (D) - Islamic Estate and Inheritance
- ▶ **Topic 17:** Plan Recommendation, Implementation and Review (I-M)

Enquiry and Registration

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