

Organised by:



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بروني دارالسلام سنترال بڠدا
BRUNEI DARUSSALAM CENTRAL BANK

Financial Planning Practitioners' Programme

19 September - 4 October 2022



Programme Overview

The Financial Planning Practitioners' Programme (FPPP) was formulated specifically to address the licensing requirement for financial planners with the guidance and support of BDCB as well as TAP, to cover the minimum knowledge and skills expected of a competent financial planner. This programme also focuses on the area of Islamic wealth management and financial planning. Emphasis will be more on the Islamic aspects, as part of a comprehensive planning and management of wealth, and how these concepts can be translated into practical applications.

The workshop consists of two parts; theory and skills which will be followed by assessments to ensure the financial planners demonstrate the necessary knowledge and skills required to serve the public effectively.

BDCB has appointed BILIF to be the official Licensing Programme for the purposes of the licensing requirements under the Securities Markets Order, 2013.

Programme Objectives

- Demonstrate profound knowledge and understanding of financial planning.
- Various financial ratios used for Financial Planning;
- Cash management and budgeting, time value of money, investment planning, risk management, insurance planning and estate planning;
- Establish financial goals and provide solutions and recommendations;
- Apply the Shariah principles in financial planning and wealth management;
- Appreciate the diverse perspectives between conventional and Islamic financial planning; and
- Understand the concepts of Maqasid Shariah and how these objectives can be achieved.

Programme Outline

Module 1: introduction to Financial Planning

Module 2: Financial Statement and Financial Ratio Analysis

Module 3: Cash Management and Budgeting

Module 4: Time Value of Money

Module 5: Risk Management and Insurance Planning

Module 6: Investment Products and Investment Planning

Module 7: Unit Trusts

Module 8: Retirement Planning

Module 9: Estate Planning

Module 10: Code of Ethics and Regulatory Controls & Practices

EXAMINATION

- Two (2) hours examination consisting 100 multiple choices questions.
- The passing marks for the exam is 65%.

SKILLS ASSESSMENT & KNOWLEDGE APPLICATION

- To assess readiness of candidate to conduct financial planning for clients.
- There are (2) two parts of assessment: Solution Design and Skill Assessment

Programme Schedule

DATE	PROGRAMME
19 - 22 Sept 2022	Theory
26 Sept 2022	Two (2) hours Exam
27 - 30 Sept 2022	Phase 2: Skills Training
3 - 4 Oct 2022	Skills Assessment

Who Should Attend

- Individuals interested to apply for licensing from BDCB under investment/investment-linked advice.
- Individuals who are selling investments and/or investment-linked insurances.
- Individuals interested to become a financial planner.

Programme Leader

CHONG WAN CHING

Wan Ching began her career in a manufacturing company where she successfully developed, implemented and obtained a number of product and quality management system certifications including the internationally recognised ISO 9002. Since then she moved on to various international and local financial institutions in areas of insurance, investment, banking, sales, sales management and training. Wan Ching believes in continuous self-development and has obtained various certifications.

She is a Certified Financial Planner registered with the Financial Planning Association of Singapore. She is also an Accredited Training Professional, Certified NLP Master Practitioner, Certified Coach Practitioner, and Six Seconds EQ Certified Practitioner.

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CATEGORIES	STAKEHOLDER	NON-STAKEHOLDER
PROGRAMME FEE	<input type="checkbox"/> \$ 2,105.00	<input type="checkbox"/> \$ 2,750.00

Stakeholders are participants from MOFE, BDCB and all domestic banks in Brunei Darussalam.

TERMS AND CONDITIONS

- Participants must complete all scheduled sessions and activities for them to receive the certificate of attendance/ completion.
- Payment must be made upon receipt of invoice issued by BILIF.
- BILIF reserves the right to amend, change or cancel the programme at any given time. We will immediately notify participants and organisations if any such changes are to be made.
- By signing this form, you hereby agree to the terms and conditions.

CANCELLATION POLICY

- All cancellation must be submitted to BILIF in writing either by letter or email.
- Any cancellation received 30 days or more prior to the training date will incur a cancellation fee of 10% of the programme fee.
- Cancellation received 8 - 14 days to the training date will incur a cancellation fee of 50% of the programme fee.
- Cancellation of registrations received 7 days or less from the date of training or if the delegate fails to attend the training, he/she will be considered as 'no show' and is subjected to 100% of the programme fee.
- BILIF welcomes and accepts replacement of participants a day before the training commences.

Please complete this form.

Name:		IC Number:	
Position:		Department:	
Email:		Phone:	

Name:		IC Number:	
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Name:		IC Number:	
Position:		Department:	
Email:		Phone:	

APPROVING OFFICER

Name:		Email:	
Position:		Department:	

Signature and Company's Stamp

Please email your completed form to registration@bilif.com.bn by 1 September 2022.