




**USER MANUAL**

**SUPPLY, DESIGN, DEVELOPMENT,  
INSTALLATION, TESTING,  
COMMISSIONING AND MAINTENANCE OF  
REGISTRATION SOFTWARE  
FOR  
FEDERATION OF INVESTMENT  
MANAGERS MALAYSIA (FIMM)**

**MODULE: CONSULTANT MANAGEMENT  
(PROFILE MAINTENANCE BY  
DISTRIBUTOR)**

**GROUP: DISTRIBUTOR**


<b>AGENCY NAME</b>	<b>:</b>	<b>FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)</b>
<b>DOCUMENT DATE</b>	<b>:</b>	<b>24/03/2025</b>
<b>DOCUMENT VERSION</b>	<b>:</b>	<b>1.0</b>

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	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	iv

## DOCUMENT DESCRIPTION

This document is prepared to explain how to use the FCS system. This user manual explains the functions and step by step how to use the system completely to the users involved.

Document Information	
<b>Project Name</b>	SUPPLY, DESIGN, DEVELOPMENT, INSTALLATION, TESTING, COMMISSIONING AND MAINTENANCE OF REGISTRATION SOFTWARE FOR FEDERATION OF INVESTMENT MANAGERS MALAYSIA (FIMM)
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## DOCUMENT CONTROL

Version History			
Version No	Version Date	Summary	Writer
0.1	17/03/2025	First draft document	Wan Arissa Insyirah binti Wan Aniff
1.0	24/03/2025	Final Document	Wan Arissa Insyirah binti Wan Aniff


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## ACRONYM

ACRONYM	DESCRIPTION
AAR	Alternate Authorized Representative
AMLCFT	Anti-Money Laundering/Combating the Financing of Terrorism
AMSF	Annual Membership Subscription Fee
AR	Authorized Representative
AUM	Asset Under Management
BOD	Board of Directors
CAS	Consultant Alert
CEILLI	Certificate Examination in Investment-Linked Life Insurance
CEO	Chief Executive Officer
CFP	Certified Financial Planner
ChFC	Chartered Financial Consultant
CMSRL	Capital Market Services Representative License
CPD	Continuing Professional Development
CPRA	Corporate Private Retirement Scheme Adviser
CPRE	Computerized Private Retirement Scheme Examination
CSD	Corporate Services Division
CUTA	Corporate UTS Adviser
CUTE	Computerized Unit Trust Examination
DMS	Document Management Storage

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FIMM	Federation of Investment Managers Malaysia
FMS	Funds Malaysia System
GM	General Manager

ACRONYM	DESCRIPTION
HOD	Head of Department
ID	Industry Development
IFP	Islamic Financial Planner
IPRA	Institutional Private Retirement Scheme Adviser
ISD	Industry Services Division
IUTA	Institutional Unit Trust Scheme Adviser
KYC	Know Your Customer
LRA	Legal and Regulatory Affairs
MOF	Ministry of Finance
NAV	Net Asset Value
NRIC	National Registration Identity Card
OTP	One Time Password
PDS	Professional Development and Services
PRC	Private Retirement Scheme Consultant
PRP	Private Retirement Scheme Provider
PRS	Private Retirement Scheme
R&A	Research and Analytics
RD	Registration Department

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RFP	Registered Financial Planner
RSD	Regulatory Services Division
SC	Security Commission Malaysia
SRFP	Shariah Registered Financial Planner
SRS	System Requirement Specification
ACRONYM	DESCRIPTION
SD	Supervision Department
UML	Unified Modelling Language
UTC	Unit Trust Consultant
UTMC	Unit Trust Management Company
UTS	Unit Trust Scheme
OR	Official Receipt
CN	Credit Note
IDD	Integration Design Document


Table 1: Acronym Table

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## ABBREVIATIONS ROLE

Abbreviation	DESCRIPTION
C-CLRK	Consultant Applicant
C-CON	Consultant
C-APP	Consultant Applicant
D-C-MKR	Consultant - Maker
D-C-CHK	Consultant - Approver
F-RD	FIMM RD

*Table 2: Abbreviation Role Table*

	<b>Project</b> Federation of Investment Managers Malaysia (FIMM)	<b>Reference</b> ZANKO/FIMM/UM/V0.1	<b>File</b> User Manual Document	<b>Version</b> 1.0	<b>Date</b> 24/03/25	<b>Page</b> 10
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## CHAPTER 1: INTRODUCTION

The **FCS System User Manual** is designed to provide users with a comprehensive guide to effectively utilizing the **FCS system**. This manual serves as a reference document to help users understand the system's functionalities, features, and processes to ensure smooth operation and efficient task completion.

By following the instructions in this manual, users will be able to navigate the system with ease, perform necessary actions, and troubleshoot common issues. The manual is structured to accommodate both new and existing users, offering clear step-by-step guidance for system access and usage.

### 1.1.2 Purpose

The purpose of this manual is to equip users with the essential knowledge required to maximize the benefits of the **FCS system**. It provides:

- **A detailed overview of the system's functions and capabilities** to help users understand its key features.
- **Step-by-step instructions** on accessing and operating the system efficiently.
- **Guidelines on alternative modes of operation and contingencies** in case of system issues or errors.
- **Best practices and recommendations** for optimal system use.

This manual ensures that users can confidently navigate the system while maintaining security, accuracy, and efficiency in their tasks.

### 1.1.3 Contact Information

If users require further assistance or encounter any issues while using the **FCS system**, they can contact the **Federation of Investment Managers Malaysia (FIMM)** for support.


#### Support Contact Details:

**Phone:** [Insert Contact Number]

**Email:** [Insert Support Email]

**Website:** [Insert FIMM Website]



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## CHAPTER 2: GENERAL SYSTEM INSTRUCTION

### 2.1 User Log in

The FCS system application is accessible only to registered users. Each user will be provided with a unique User ID and password to log in securely.

To access the system, users must navigate to the **main login page** ([Insert URL]) and enter their credentials. For first-time users, an initial login setup may be required to activate their accounts.

For security reasons:


1. Users should keep their login credentials confidential.
2. Passwords should be changed periodically to enhance security.
3. In case of forgotten credentials, users can use the **"Forgot Password?"** option to reset their password.


#### Steps to Open the FCS System Website:

2. **Launch your web browser** (Google Chrome, Mozilla Firefox, Microsoft Edge, etc.)
3. **Enter the FCS System URL** in the address bar and press **Enter**.
4. The **login page** will appear, allowing users to enter their credentials.

#### 2.1.1 Log in

##### Access the Login Page

1. On the homepage, locate the 'Log in'  button and click it.
2. In the **User ID** field, enter your registered **User ID**.
3. In the **Password** field, enter your **password**.

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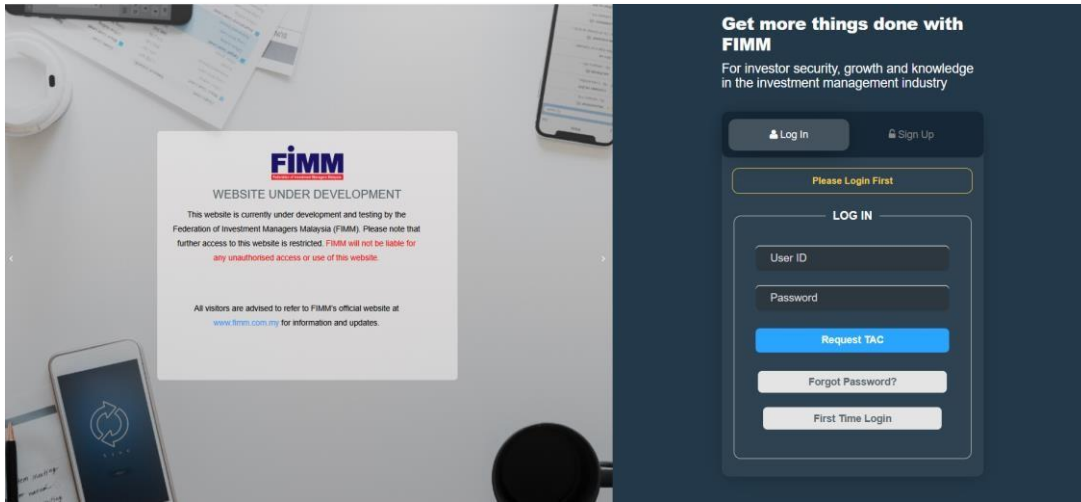


Diagram 1: FCS Homepage

### Display **Enter Your Credentials**

4. System will show sign in page, User need to insert this item
  - User ID
  - Password
  - TAC

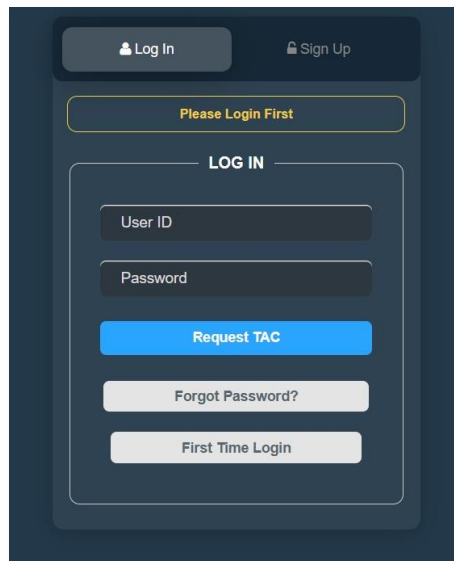




Diagram 2: Log in Display

### Successful Login

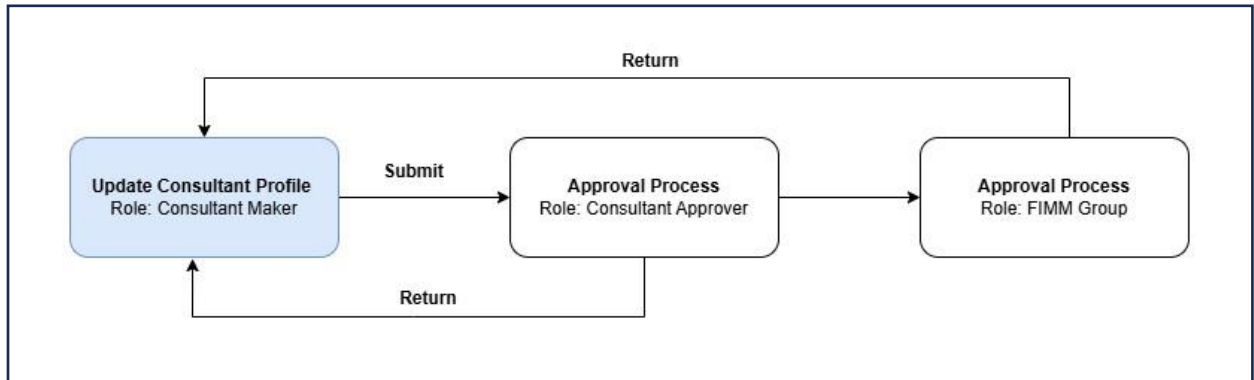
5. Click  button and the system will be redirected to the FCS System dashboard.

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## 3.12 Profile Maintenance by Distributor

### 3.12.1 Consultant Update Profile by Consultant Maker

#### 3.12.1.1 Process Flow



#### 3.12.1.2 Manual Steps

1. Click menu 'Consultant'. System will display list of submenu for Consultant.

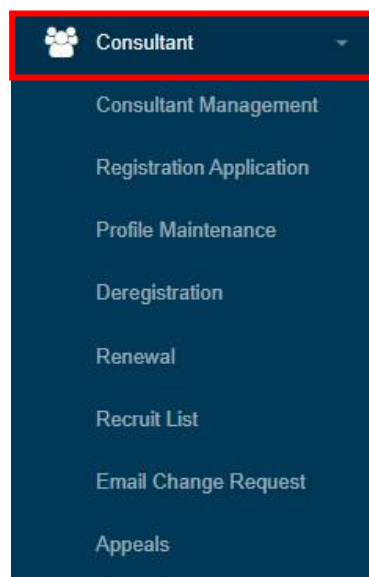


Diagram 544: Consultant Menu

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2. Click submenu 'Consultant Management'.

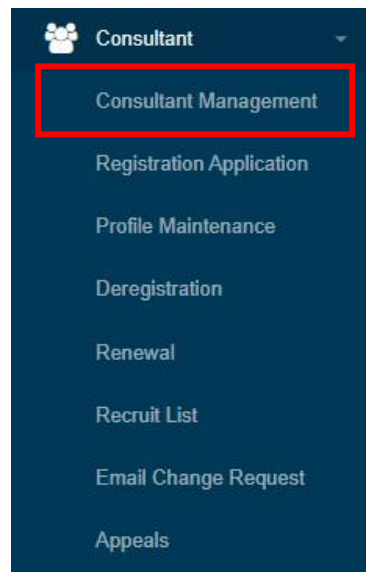


Diagram 545: Submenu 'Consultant Management'

3. System will display List of Consultant

NO	DISTRIBUTOR NAME	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	EMAIL	PHONE NO	REGISTRATION STATUS	ACTION
1	Prestasi Kewangan Sdn Bhd	Jessica Lim	N9012345	F02029223	UTS	jessicaumf@yopmail.com	+60142656821	Active	
2	Prestasi Kewangan Sdn Bhd	Umairah binti Mansor	001201000121	F02029222	PRS	umairahum@yopmail.com	+60142656821	Active	

Diagram 546: List of Consultant

4. In List of Consultant under column Action, Consultant Maker click at desired consultant.


5. System will navigate to main page of consultant detail organize under following tabs: i. Registration Info

- a. Profile section

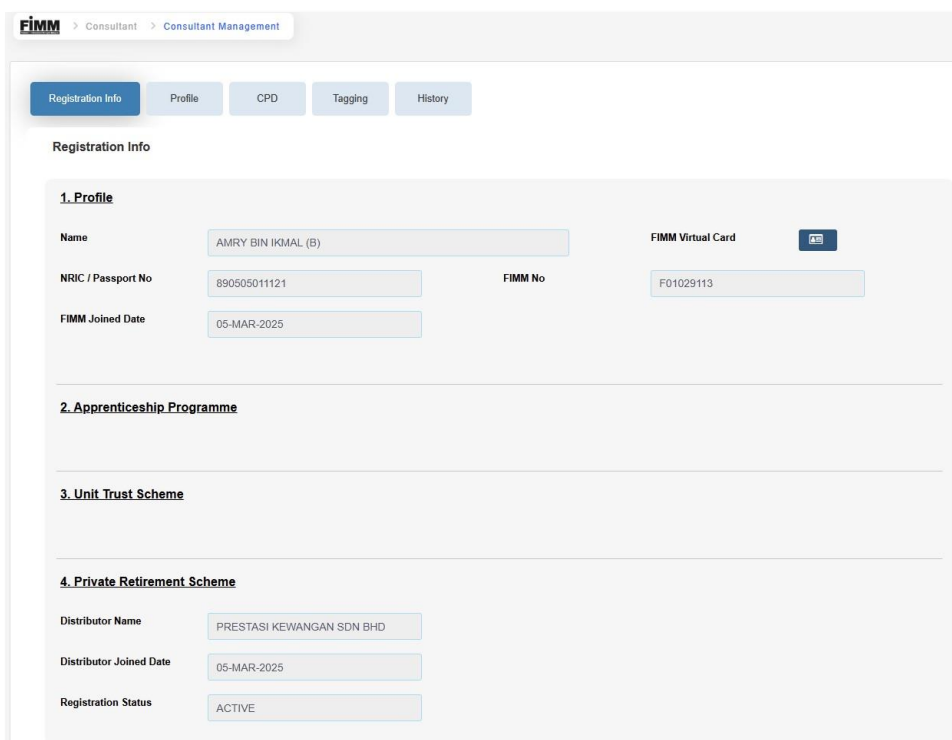
- Consultant Name
- NRIC/Passport No
- FIMM No
- FIMM Joined Date
- FIMM Inactive Date

- b. Apprenticeship Programme

- AP Status (Completed/In-Progress/N/a)
- AP Commencement Date

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- AP Expiry Date (Hidden once AP Status Completed)
- c. Unit Trust Scheme section
  - Distributor Name
  - Distributor Joined Date
  - Registration Status
  - Reason (if terminated - termination type selected by distributor; if revoked - revocation type selected by RD)
- d. Private Retirement Scheme section
  - Distributor Name
  - Distributor Joined Date
  - Registration Status
  - Reason (if terminated - termination type selected by distributor; if revoked - revocation type selected by RD)



The screenshot displays the 'Registration Info' tab in the FIMM system. It features a navigation bar with tabs for 'Registration Info', 'Profile', 'CPD', 'Tagging', and 'History'. The 'Registration Info' section is active and contains four main sections:

- 1. Profile:** Includes fields for Name (AMRY BIN IKMAL (B)), NRIC / Passport No (890505011121), FIMM Joined Date (05-MAR-2025), and FIMM No (F01029113). A 'FIMM Virtual Card' button is also present.
- 2. Apprenticeship Programme:** This section is currently empty.
- 3. Unit Trust Scheme:** This section is currently empty.
- 4. Private Retirement Scheme:** Includes fields for Distributor Name (PRESTASI KEWANGAN SDN BHD), Distributor Joined Date (05-MAR-2025), and Registration Status (ACTIVE).

Diagram 547: Registration Info Tab

- ii. Profile, divided into section

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Registration Info
Profile
CPD
Tagging
History

### Profile

1 Profile Details
2 Academic Qualifications
3 Scheme Selection
4 Type of Registration
5 Screening
6 Others

#### Personal Details

**Name (As Per NRIC)** AMRY BIN IKMAL (B)

**NRIC No.** 890505011121 [View File](#)

**Race** MALAY **Nationality** Malaysian

**Date of Birth** 05-MAY-1989 **Age** 35

**Gender** MALE

**Address** TAMAN INDAH 2

**Postcode** 30000 **City** IPOH

**State** PERAK **Phone Number** +60142656821

**Email Address** amryum@yopmail.com

Diagram 548: Profile Tab

### iii. CPD

Registration Info
Profile
CPD
Tagging
History

### CPD

CPD RECORDS FOR  
2025

Name  
Amry bin Ikmal (B)
FIMM No  
F01029113
NRIC/Passport No  
890505011121

136 Approve Point
32 Pending Point
0 Rejected Point


Application Type  
-- Choose --
[Find](#)

Show 10 entries

NO	PROGRAM TITLE	APPLICATION TYPE	YEAR	START DATE	END DATE	APPROVED POINT	PENDING POINT	REJECTED POINT
1	TECHNICAL ANALYSIS SERIES: PRACTICAL AND EFFECTIVE TREND TRADING STRATEGY FOR TRADERS	Pre-Vetting	2025	18-Mar-2025	22-Mar-2025	8	0	0
2	INDUSTRY 4.0 AND ITS IMPACT OF MALAYSIAN CAPITAL MARKET	Pre-Vetting	2025	16-Mar-2025	17-Mar-2025	8	0	0
3	PSYCHOLOGY OF INVESTING: VICTORY OVER YOUR THOUGHTS, SUCCESS IS YOURS !	Pre-Vetting	2025	15-Mar-2025	15-Mar-2025	8	0	0

Diagram 549: CPD Tab

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6. Under tab Profile, Consultant Maker click button . System will display all action that can be done:

- i. Update Profile (Hide if no distributor attached)

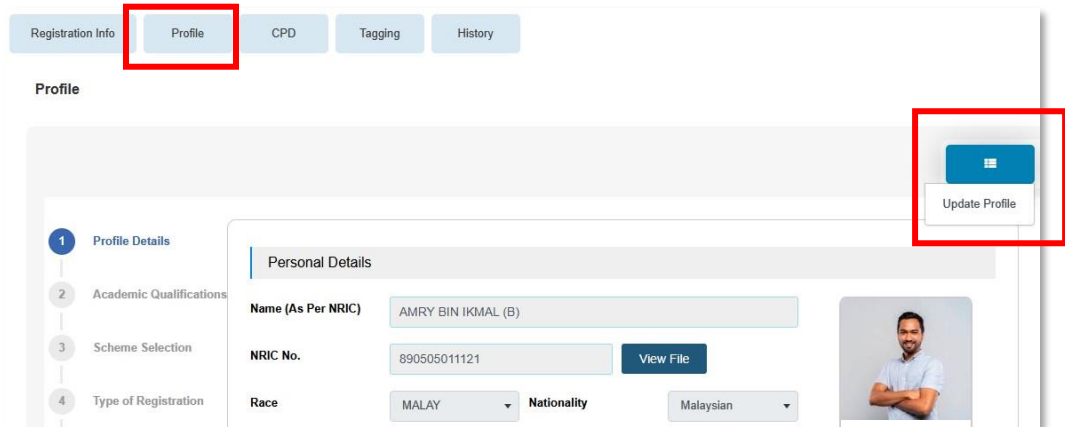


Diagram 550: Update Profile button

7. Consultant Maker click 'Update Profile'. System will navigate to Update Profile process:

- i. Profile Details

**Malaysian**

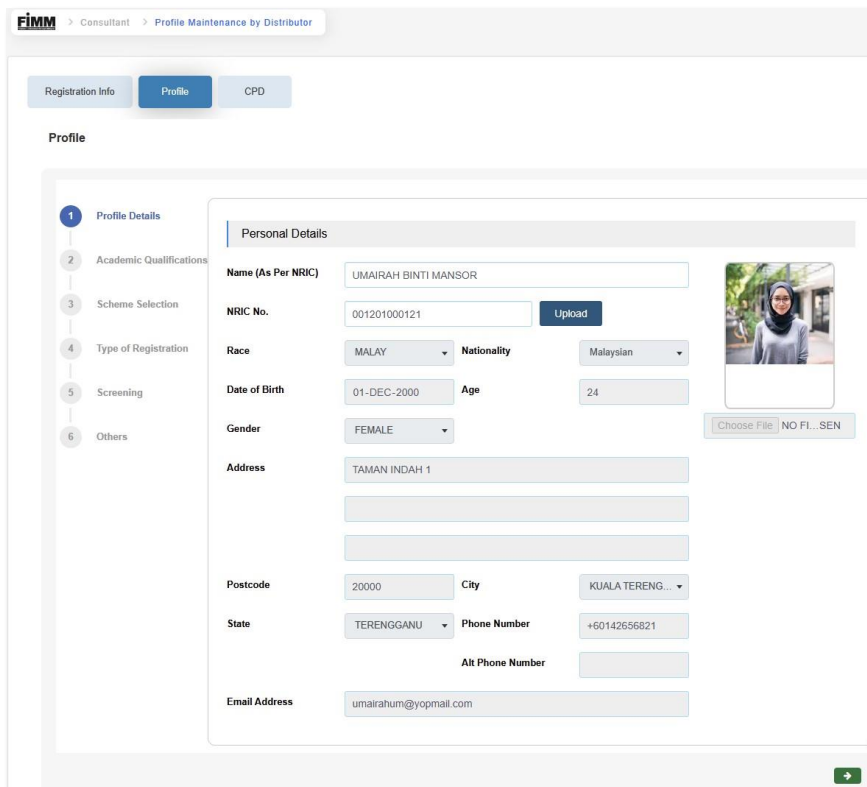


Diagram 551: Malaysian Profile Details section

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## Non - Malaysian

The screenshot shows the FIMM Consultant Profile Maintenance by Distributor page. The 'Profile' tab is selected, and the 'Personal Details' section is active. The form contains the following fields:

- Name (As Per NRIC):** JESSICA LIM
- Passport No.:** N9012345 (with an 'Upload' button)
- Race:** CHINESE (dropdown)
- Nationality:** Non-Malaysian (dropdown)
- Passport Expiry:** 21-APR-2029 (calendar icon)
- Working Permit Expiry:** 28-JUN-2028 (calendar icon)
- Date of Birth:** 09-SEP-1999
- Age:** 25
- Gender:** FEMALE (dropdown)
- Address:** NO. 87, JALAN KELANG LAMA (with a 'Choose File' button and 'NO FI... SEN' text)
- Postcode:** 58100
- City:** KUALA LUMPUR (dropdown)
- State:** WILAYAH PERS... (dropdown)
- Phone Number:** +60142656821
- Alt Phone Number:** (empty field)
- Email Address:** jessicaumf@yopmail.com

A green arrow button is located at the bottom right of the form.

Diagram 552: Non - Malaysian Profile Details section

8. Consultant Maker enters all desired details to be updated and click



. System will display academic qualification section: (No action to be done here)

- i. Academic Qualification: (Consultant Maker unable to update the field).
  - a. SPM/SVM
  - b. STPM/STAM
  - c. Diploma
  - d. Degree
  - e. Master
  - f. PhD



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Diagram 553: Academic Qualifications section




9. Consultant Maker click . System will display Scheme Selection:
- Registration Type (Consultant Maker can change the Type Of Registration)
    - Staff
    - Tied-agent
  - Distribution Point (Consultant Maker can update their respective distribution location)
  - Scheme
  - List Of Distributor

Diagram 554: Scheme Selection section

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10. Consultant Maker enters all desired details to be updated and click . System will navigate to Type of Registration section (No field to be updated here)

i. Examination

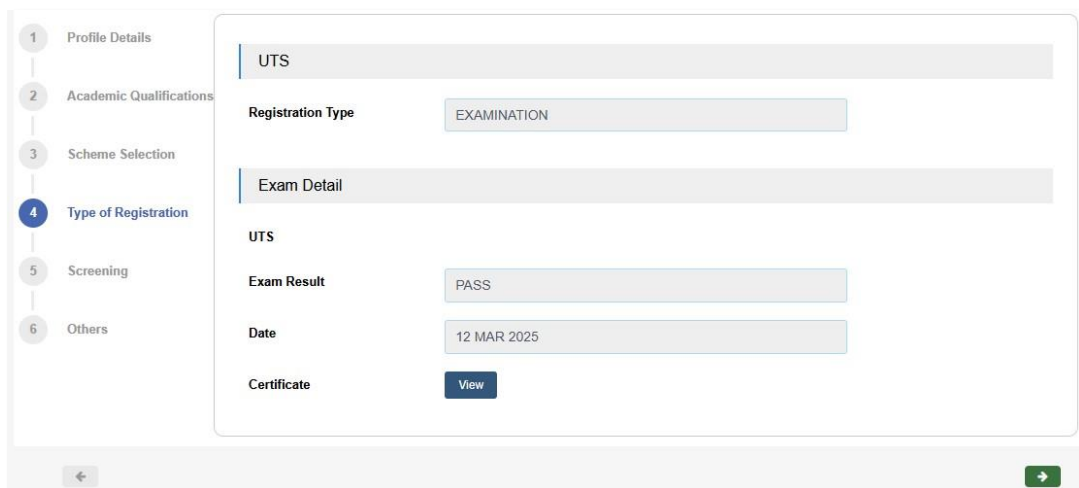


Diagram 555: Type of Registration – Examination

ii. Exemption

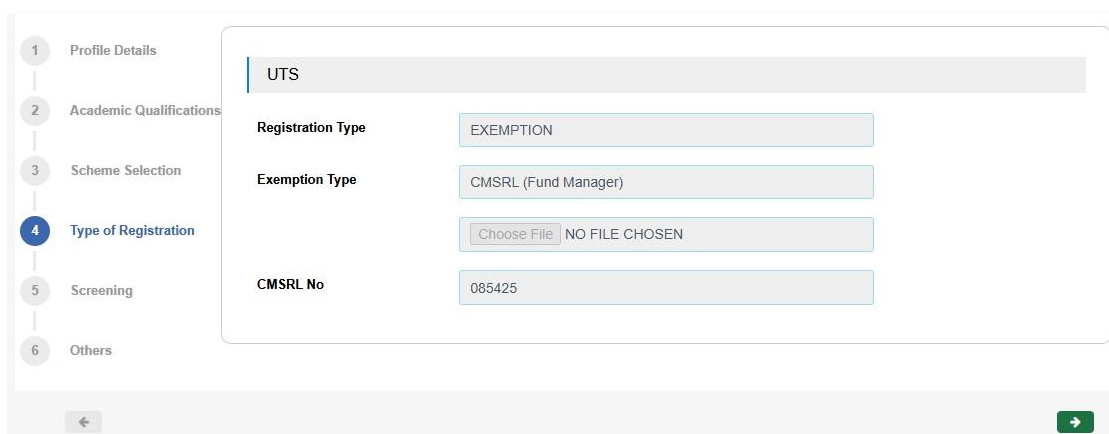

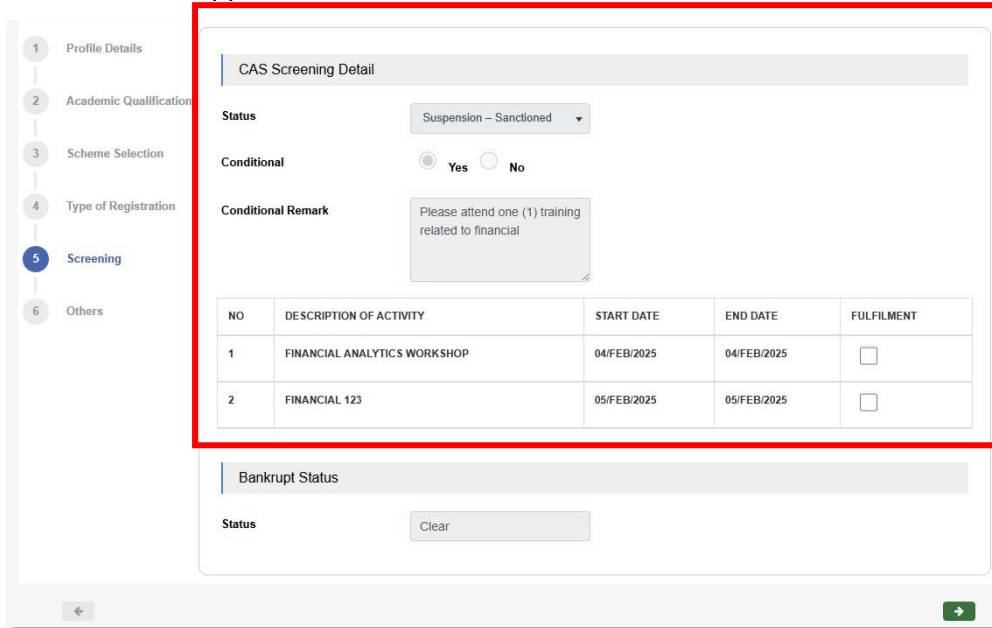


Diagram 556: Type of Registration - Exemption

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11. Consultant Maker click . System will display Screening Section:
  - i. Under Screening section, Consultant Maker can view failed CAS status.
    - a. System will display an additional sub-section for CAS requirements, including remarks by LRA to inform the consultant of the requirements they need to fulfil.
    - b. Users must select the description of activities that fulfils the condition set by LRA to proceed with submitting the application.



**CAS Screening Detail**

Status: Suspension – Sanctioned

Conditional: ☒ Yes ☐ No

Conditional Remark: Please attend one (1) training related to financial


NO	DESCRIPTION OF ACTIVITY	START DATE	END DATE	FULFILMENT
1	FINANCIAL ANALYTICS WORKSHOP	04/FEB/2025	04/FEB/2025	<input type="checkbox"/>
2	FINANCIAL 123	05/FEB/2025	05/FEB/2025	<input type="checkbox"/>

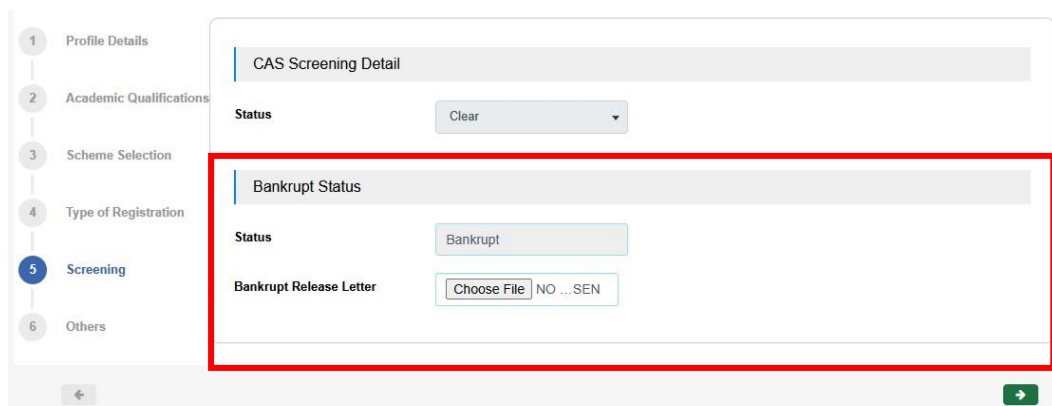
**Bankrupt Status**

Status: Clear

Diagram 557: Failed CAS Screening

- ii. Consultant – Maker can view bankruptcy status.
  - a. User able to upload the consultant's discharge letter issued by High Court or Jabatan Insolvency Malaysia, attested by commissioner to uplift consultant's bankruptcy status.

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The screenshot shows a web application interface for FIMM. On the left is a sidebar with a vertical list of steps: 1. Profile Details, 2. Academic Qualifications, 3. Scheme Selection, 4. Type of Registration, 5. Screening (highlighted with a blue circle), and 6. Others. The main content area is titled 'CAS Screening Detail'. Below this title is a 'Status' dropdown menu with a 'Clear' button next to it. The 'Bankrupt Status' section is highlighted with a red rectangular box. Inside this box, there is a 'Status' dropdown menu with 'Bankrupt' selected. Below this is a 'Bankrupt Release Letter' section with a 'Choose File' button and a 'NO ...SEN' button. At the bottom of the main content area, there is a green arrow button pointing right.

Diagram 558: Failed Bankruptcy Status

12. Consultant Maker enters all desired details to be updated and click



. System will display Others Section:

- i. Others
  - a. Upload Supporting Document (User able to upload supporting document)
  - b. Upload Signed Consent Form
  - c. Declaration

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**Upload Supporting Document**

File Name:  Choose File NO FILE CHOSEN Add

NO	FILE NAME	ATTACHMENT FILE	ACTION
1	MAKAER ATTCH	TrainingCert.pdf	<span>View</span>

NO	FILE NAME	ACTION
1	ATTCH 1	<span>View</span>

**Upload Signed Consent Form**

Application Consent Form Choose File NO FILE CHOSEN View

[FIMM-Consent-Form.pdf](#)

NO	FILE NAME	ACTION
1	FIMM-Consent-Form.pdf	<span>View</span>

**Declaration**

Name(As Per NRIC)

NRIC

4. I undertake and agree to be bound by and comply with the FIMM rules and securities laws issued by the Securities Commission Malaysia and any other applicable laws at all times;

5. I undertake to immediately notify the principal and/or FIMM in the event that I fail to satisfy any of the fit and proper criteria prescribed by FIMM;

6. I declare and confirm that I have read and understood FIMM's Privacy Notice available on its website, and I hereby consent to the processing of my personal data provided herein by FIMM for the purposes stated in the Privacy Notice;

7. I will timely and fully pay all fees and charges imposed by FIMM and undertake to do all things necessary for my continuing registration with FIMM;

8. I expressly consent and authorise the principal and FIMM to obtain and/or disclose any information, including but not limited to, credit information, academic and professional qualifications, from and/or to a Credit Reporting Agency or any source deemed appropriate and reasonable for the purposes of this application for registration with FIMM. This consent shall remain in effect during the period of any registration with FIMM as a consultant.

☒ I understand the gravity of the above statements and the implications of non-compliance with FIMM's Rules and in providing false information. I affirm that the statements made herein are true to the best of my knowledge and belief.

Save

Diagram 559: Others section


13. To save application, Consultant Maker click button Save.
- i. System will prompt message "Confirm to save?".


Confirm to save?

YES NO

Diagram 560: Confirmation Message

- ii. User choose YES, system will navigate to application and status change to 'Draft'.

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iii. If user click , system stays at current page.

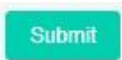

14. To submit the application, user click .
- i. System will prompt message “Confirm to proceed?”.



Diagram 561: Confirmation Message

- ii. User choose , system will display successful application message and send the application for Consultant – Approver action.

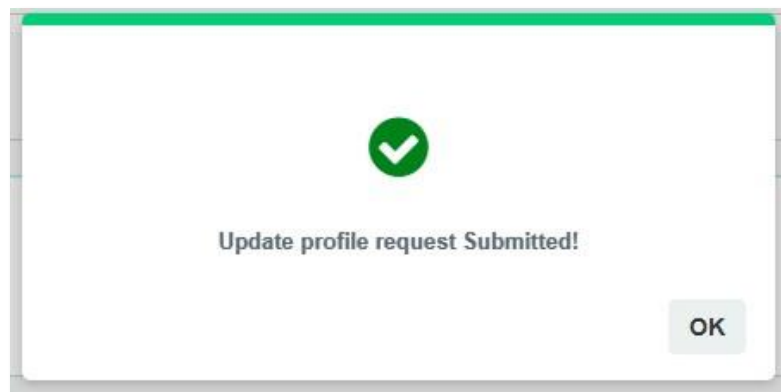



Diagram 562: Successful Application message

- iii. System back to List of Profile Update application and status change to 'Pending Approve'.

### Returned – Consultant Approver

1. In List of Profile Update applications under column Action, user click button  at application with status “Returned – Consultant Approver”.

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NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	14-Mar-2025	Jessica Lim	N9012345	F02029223	UTS	Active	Profile Update	Returned - Consultant Approver	
2	14-Mar-2025	Umaisrah binti Mansor	001201000121	F02029222	PRS	Active	Profile Update	Pending Approve	

Diagram 563: List of Profile Update applications

2. System will display previously submitted application and Consultant Maker can edit these fields in all previous section:

- Profile
- Academic Qualification
- Scheme Selection
- Type Of Registration
- Screening
- Others

3. Consultant Maker can view comment from Consultant Approver the reason for returning the application.

1 Profile Details  
2 Academic Qualifications  
3 Scheme Selection  
4 Type of Registration  
5 Screening  
6 Others

Distribution Point

Registration Type  
☒ Tied Agent ☐ Staff

Distribution Point  
Sarawak Branch

Scheme Selection

Scheme  
☒ Unit Trust Scheme (UTS) ☐ Private Retirement Scheme (PRS)

List of Distributor  
PRESTASI KEWANGAN SDN BHD

Return Comment  
Update Profile application returned due to incomplete attachments

Comment  
500 characters remaining

Update

Diagram 564: Return Comment by Consultant Approver

4. To re – submit the application, Consultant Maker click .
- System will prompt message “Confirm to proceed?”.

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	26

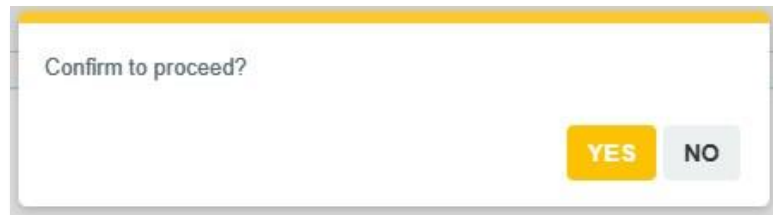



Diagram 565: Confirmation Message

- ii. User choose , system will display successful application message and send the application for Consultant – Approver action.

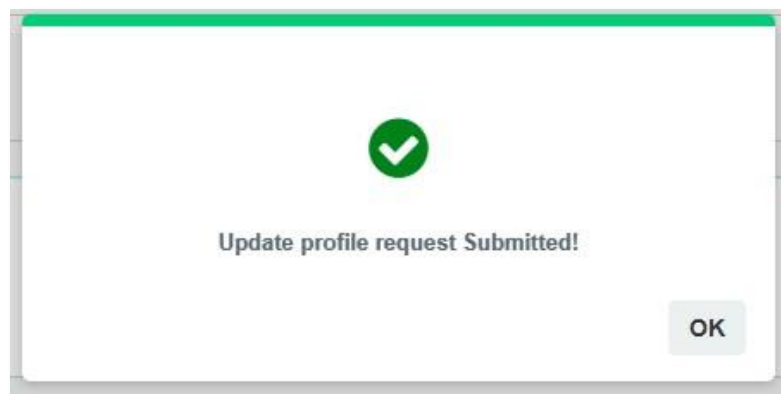



Diagram 566: Successful Application message

- iii. System back to List of Profile Update application and status change to 'Pending Approve'

### Failed CAS Screening


1. In List of Profile Update applications under column Action, user click button  at application with status "Pending CAS Confirmation".

NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	09-Mar-2025	Chen Li Fang	H78901234	F01002001	PRS	Suspended	Profile Update	Pending CAS Confirmation	
2	09-Mar-2025	Zulhilmil Bukhari	F56789012	F01001999	PRS	Active	Profile Update	Returned - RD	

Diagram 567: List of Profile Update applications

2. System will display previously submitted application and consultant details:
- Profile
  - Academic Qualification

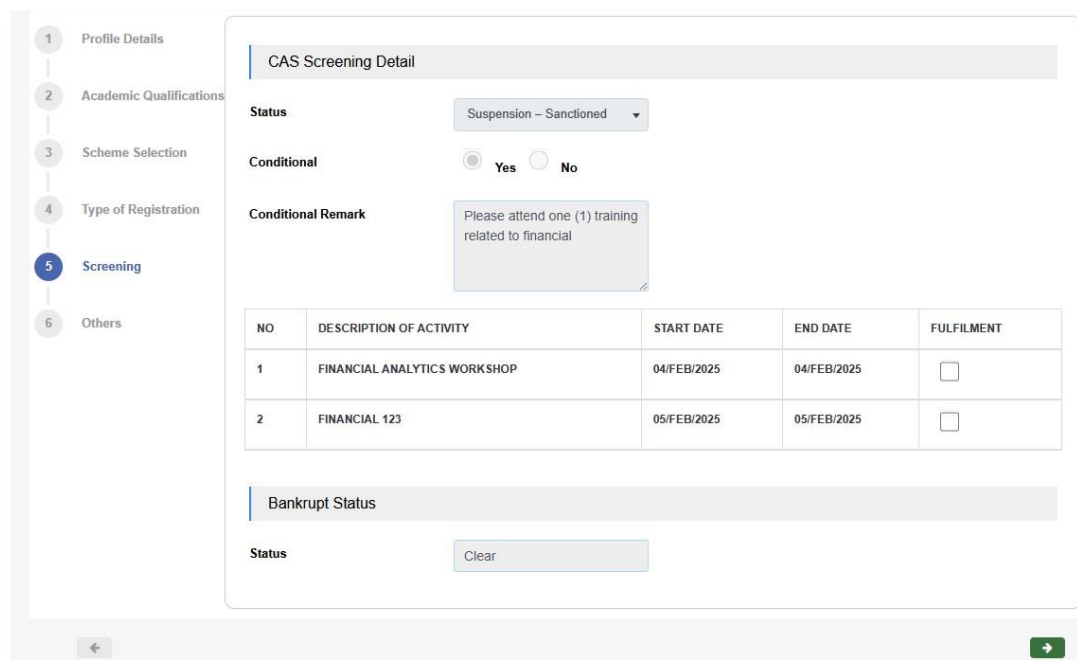


	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	27

- iii. Scheme Selection
- iv. Type Of Registration
- v. Screening
- vi. Others

3. Under Screening section, user can view failed CAS status.

- i. For conditional CAS status, Consultant Maker can see remarks from LRA of the training need to attend to uplift the conditional status.
- ii. Consultant Maker must select 1 training that has been completed by the Consultant applicant to proceed with the application.



**CAS Screening Detail**

**Status** Suspension – Sanctioned

**Conditional** ☒ Yes ☐ No

**Conditional Remark** Please attend one (1) training related to financial

NO	DESCRIPTION OF ACTIVITY	START DATE	END DATE	FULFILMENT
1	FINANCIAL ANALYTICS WORKSHOP	04/FEB/2025	04/FEB/2025	<input type="checkbox"/>
2	FINANCIAL 123	05/FEB/2025	05/FEB/2025	<input type="checkbox"/>

**Bankrupt Status**


**Status** Clear

Diagram 568: Failed CAS Screening

## Failed Bankruptcy Screening

- 1. In List of Profile Update applications under column Action, Consultant Maker click

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	28

button  at application with status “Pending Bankruptcy Confirmation”.

NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	14-Mar-2025	Jessica Lim	N9012345	F02029223	UTS	Active	Profile Update	Rejected	
2	14-Mar-2025	Umairah binti Mansor	001201000121	F02029222	PRS	Active	Profile Update	Pending Bankruptcy Confirmation	

Diagram 569: List of Profile Update applications

2. System will display previously submitted application and consultant:
  - i. Profile
  - ii. Academic Qualification
  - iii. Scheme Selection
  - iv. Type Of Registration
  - v. Screening
  - vi. Others
3. Under Screening section, user can view consultant applicant failed Bankruptcy Status.
  - i. Consultant Maker need to upload letter of release for the consultant to proceed with the application.

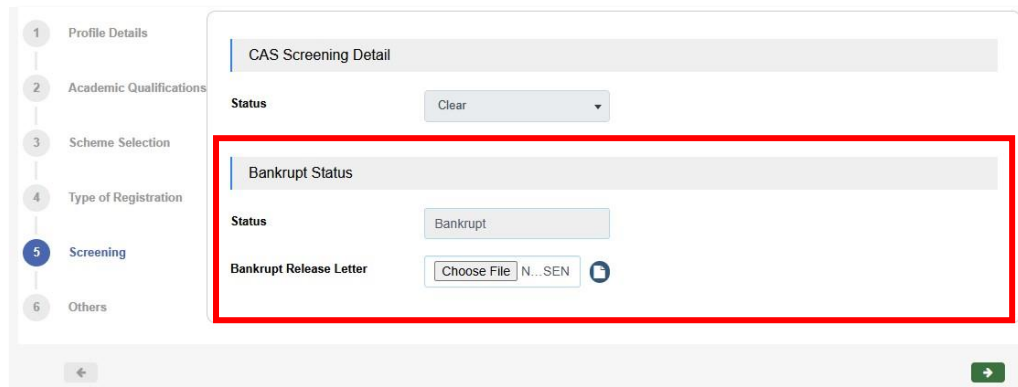




Diagram 570: Failed Bankruptcy Screening

## Returned – RD

1. In List of Profile Update applications under column Action, user click button  at application with status “Returned – RD”.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	29



NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	09-Mar-2025	Chen Li Fang	H78901234	F01002001	PRS	Suspended	Profile Update	Pending CAS Confirmation	
2	09-Mar-2025	Zulhilmi Bukhari	F56789012	F01001999	PRS	Active	Profile Update	Returned - RD	

Diagram 571: List of Update Profile applications

2. System will display previously submitted application and Consultant Maker can edit these fields in all previous section:

- i. Profile
- ii. Academic Qualification
- iii. Scheme Selection
- iv. Type Of Registration
- v. Screening
- vi. Others

3. Consultant - Maker can view comment from RD the reason for returning the application.

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	30

1 Profile Details  
2 Academic Qualifications  
3 Scheme Selection  
4 Type of Registration  
5 Screening  
6 Others

Upload Supporting Document

File Name

Choose File

NO FILE CHOSEN

Add

NO	FILE NAME	ACTION
1	DOC 1	<div>View</div>
2	M Doc 1	<div>View</div>

Upload Signed Consent Form

Application Consent Form

Choose File

NO FILE CHOSEN

[FIMM-Consent-Form.pdf](#)

NO	FILE NAME	ACTION
1	FIMM-Consent-Form.pdf	<div>View</div>

Declaration

Name(As Per NRIC)

ZULHILMI BUKHARI

NRIC

F56789012


4. I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commission Malaysia and any other applicable laws at all times;  
5. I undertake to immediately notify the principal and/or FIMM in the event that I fail to satisfy any of the fit and proper criteria prescribed by FIMM;  
6. I declare and confirm that I have read and understood FIMM's Privacy Notice available on its website, and I hereby consent to the processing of my personal data provided herein by FIMM for the purposes stated in the Privacy Notice;  
7. I will timely and fully pay all fees and charges imposed by FIMM and undertake to do all things necessary for my continuing registration with FIMM;  
8. I expressly consent and authorise the principal and FIMM to obtain and/or disclose any information, including but not limited to, credit information, academic and professional qualifications, from and/or to a Credit Reporting Agency or any source deemed appropriate and reasonable for the purposes of this application for registration with FIMM. This consent shall remain in effect during the period of any registration with FIMM as a consultant.

☒ I understand the gravity of the above statements and the implications of non-compliance with FIMM's Rules and in providing false information, I affirm that the statements made herein are true to the best of my knowledge and belief.

Return Comment

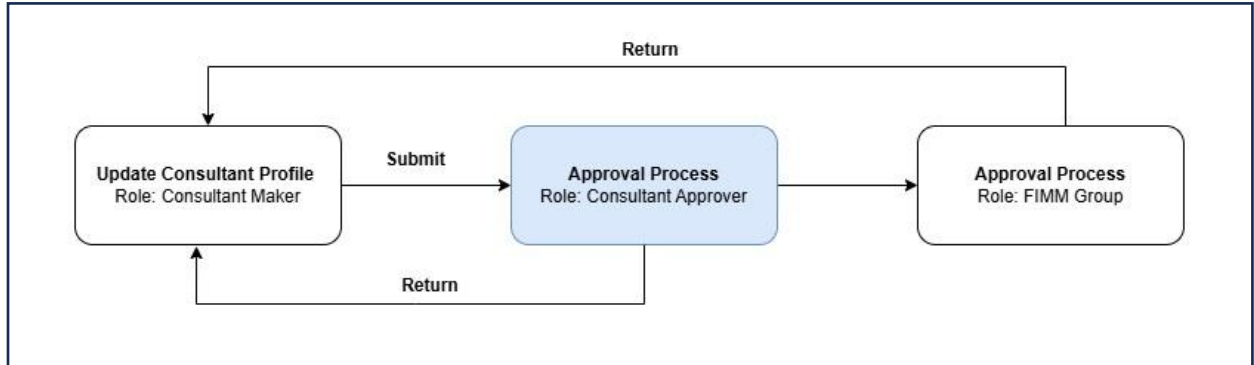
Update Profile Application by Distributor returned due to incomplete documents.

Diagram 572: Returned - RD

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	31

## 3.12.2 Approval Process by Consultant Approver

### 3.12.2.1 Process Flow



### 3.12.2.2 Manual Steps

1. Click menu 'Consultant'. System will display list of submenu for Consultant.

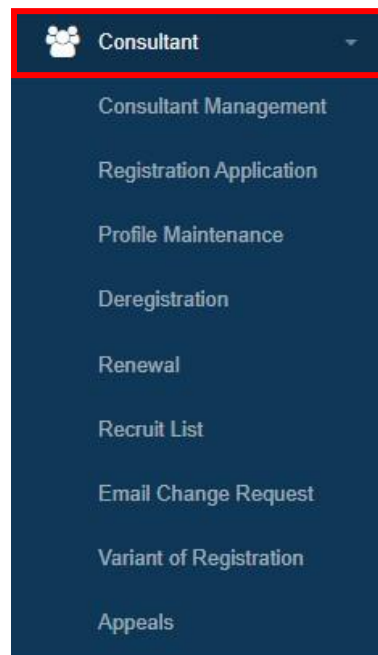


Diagram 573: Consultant Menu

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	32

- Click submenu 'Profile Maintenance'.

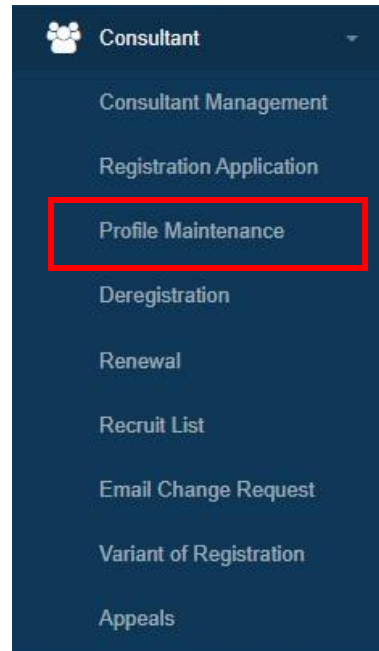


Diagram 574: Submenu 'Profile Maintenance'

- System will display List of Profile Update applications

NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	14-Mar-2025	Jessica Lim	N9012345	F02029223	UTS	Active	Profile Update	Pending Approve	
2	14-Mar-2025	Umairah binti Mansor	001201000121	F02029222	PRS	Active	Profile Update	Pending Approve	
3	12-Mar-2025	Tiara binti Adnan (W)	001201000120	F02029111	UTS	Active	Profile Update	Pending Approve - Consultant Approver	

Diagram 575: List of Profile Update applications

- Consultant Approver can filter the list

A screenshot of the FIMM web application showing the 'Consultant > Profile Maintenance' filter form. The form includes input fields for Consultant Name, NRIC / Passport No, and FIMM No. Below these are dropdown menus for Registration Status, Scheme, and Status, each with a '-- Choose --' option. At the bottom, there are date pickers for Submission Date (From and Until) in 'dd-yyy' format. A 'Reset' button and a 'Find' button are located at the bottom right.

Diagram 576: Filter

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	33

5. System will display List of Profile Update application based on the filtering.

6. User can choose total records to display per page from dropdown.  
System will display the list based on total records choose.

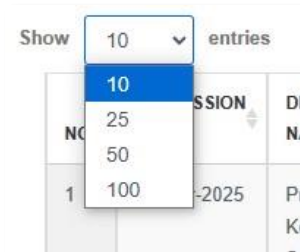


Diagram 577: Entries

7. Consultant Approver can click button 'Previous' or 'Next' to navigate to next listing page.




Diagram 578: Pagination

8. User can filter the list by keyword by inputting the keyword in search box.  
System will display record which contain the keyword.



Diagram 579: Keyword Search

9. In List of Profile Update applications under column Action, Consultant Approver click button  at application with status "Pending Approve".



NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	14-Mar-2025	Jessica Lim	N9012345	F02029223	UTS	Active	Profile Update	Pending Approve	
2	14-Mar-2025	Umairah binti Mansor	001201000121	F02029222	PRS	Active	Profile Update	Pending Approve	

Diagram 580: List of Applications

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	34

10. System will display previously submitted application and user unable to edit the details.

i. Profile Details

### Malaysian

The screenshot displays the FIMM Profile Maintenance by Distributor interface. The 'Profile' tab is selected, and the 'Profile Details' section is active. The form contains the following fields:

- Name (As Per NRIC):** UMAIRAH BINTI MANSOR
- NRIC No.:** 001201000121
- Race:** MALAY
- Nationality:** Malaysian
- Date of Birth:** 01-DEC-2000
- Age:** 24
- Gender:** FEMALE
- Address:** TAMAN INDAH 1
- Postcode:** 20000
- City:** KUALA TERENG...
- State:** TERENGGANU
- Phone Number:** +60142656821
- Alt Phone Number:**
- Email Address:** umairahum@yopmail.com

The interface includes a sidebar with navigation links: Registration Info, Profile, and CPD. The Profile section is further divided into Profile Details, Academic Qualifications, Scheme Selection, Type of Registration, Screening, and Others.

Diagram 581: Malaysian Profile Details section

### Non – Malaysian



FIMM	Project	Reference	File	Version	Date	Page
Federation of Investment Managers Malaysia (FIMM)	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	35

The screenshot displays the 'Profile Maintenance by Distributor' interface. The 'Profile' tab is selected, showing a sidebar with steps 1 through 6. The main area is titled 'Personal Details' and contains the following fields:

- Name (As Per NRIC):** JESSICA LIM (highlighted in yellow)
- Passport No.:** N9012345 (with a 'View file' button)
- Race:** CHINESE (dropdown)
- Nationality:** Non-Malaysian (dropdown)
- Passport Expiry:** 21-APR-2029 (highlighted in yellow)
- Working Permit Expiry:** 28-JUN-2028 (highlighted in yellow)
- Date of Birth:** 09-SEP-1999
- Age:** 25
- Gender:** FEMALE (dropdown)
- Address:** NO. 87, JALAN KELANG LAMA
- Postcode:** 58100
- City:** KUALA LUMPUR (dropdown)
- State:** WILAYAH PERS... (dropdown)
- Phone Number:** +60142656821
- Alt Phone Number:** (empty field)
- Email Address:** jessicaumf@yopmail.com

There is a 'Choose File' button and 'NO FILE CHOSEN' text next to the passport expiry field.

Diagram 582: Non - Malaysian Profile Details section


i. Academic Qualification:

The screenshot displays the 'Academic Qualifications' section of the profile maintenance interface. The sidebar shows step 2 is selected. The main area contains the following fields:

- Qualification Level:** -- Choose -- (dropdown)
- Graduation Year:** 2012
- College/University:** UKM
- Field of Study:** DATA SCIENCE
- Qualification Certificate:** 1 File 1 (with a 'Choose File' button and 'NO FILE CHOSEN' text)

Diagram 583: Academic Qualification section

ii. Scheme Selection

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	36

1

Profile Details

2

Academic Qualifications

3

Scheme Selection

4

Type of Registration

5

Screening

6

Others

Distribution Point

Registration Type

☒ Tied Agent

☐ Staff

Distribution Point

Johor Branch

Sarawak Branch

Scheme Selection

Scheme

☒ Unit Trust Scheme (UTS)

☐ Private Retirement Scheme (PRS)

List of Distributor

PRESTASI KEWANGAN SDN BHD

←

→

Diagram 584: Scheme Selection section

iii. Type Of Registration

a. Examination

1

Profile Details

2

Academic Qualifications

3

Scheme Selection

4

Type of Registration

5

Screening

6

Others

UTS

Registration Type

EXAMINATION

Exam Detail

UTS

Exam Result

PASS

Date

12 MAR 2025

Certificate

View

←

→

Diagram 585: Type of Registration - Examination

b. Exemption

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	37

Diagram 586: Type of Registration - Exemption

- iv. Screening
  - a. CAS Screening (Clear/whitelist/Under Investigation/Watchlist/Barred/Suspension – Under Investigation/Suspension – Sanctioned/Blacklist)
  - b. Bankruptcy Screening (Clear/Bankrupted)

Diagram 587: Screening Section

- v. Others
  - a. Supporting Document
  - b. Signed Consent Form
  - c. Declaration

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	38

1 Profile Details
2 Academic Qualifications
3 Scheme Selection
4 Type of Registration
5 Screening
6 Others

Upload Supporting Document

File Name

NO FILE CHOSEN

NO	FILE NAME	ACTION
1	ATTCH 1	<input type="button" value="View"/>
2	Maker add	<input type="button" value="View"/>
3	DOKUMEN TAMBAHAN	<input type="button" value="View"/>

Upload Signed Consent Form

Application Consent Form

NO FILE CHOSEN

[FIMM-Consent-Form.pdf](#)

NO	FILE NAME	ACTION
1	FIMM-Consent-Form.pdf	<input type="button" value="View"/>

Declaration

Name(As Per NRIC)
JESSICA LIM

NRIC
N9012345

IMPORTANT NOTES: PLEASE SCROLL DOWN AND READ ALL DECLARATIONS BEFORE ACKNOWLEDGING THAT YOU AGREED TO THE TERMS AND CONDITIONS OF THIS APPLICATION.

I, the undersigned registered Unit Trust and/or Private Retirement Scheme Consultant with the Federation of Investment Managers Malaysia ("FIMM"), hereby affirm the following:

1. I declare and confirm that all information and documents provided to FIMM in connection with my profile update(s)/renewal of registration are true, current and accurate;
2. I declare and confirm that I fulfil and will continue to ensure that I am Fit and Proper, as specified under Chapter 4 of FIMM's Consolidated Rules ("FCR");
3. I declare and confirm that I meet the eligible requirements as specified under the FCR;
4. I undertake and agree to be bound by and comply with the FIMM Rules and securities laws issued by the Securities Commission Malaysia and any other applicable laws at all times;

☒ I understand the gravity of the above statements and the implications of non-compliance with FIMM's Rules and in providing false information. I affirm that the statements made herein are true to the best of my knowledge and belief.


Diagram 588: Others Section

## vi. Comment


Comment

500 characters remaining

Diagram 589: Comment Box

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	39

11. To return the application:

- i. Consultant Approver key-in comment box and click button . System will prompt message “Confirm to proceed?”

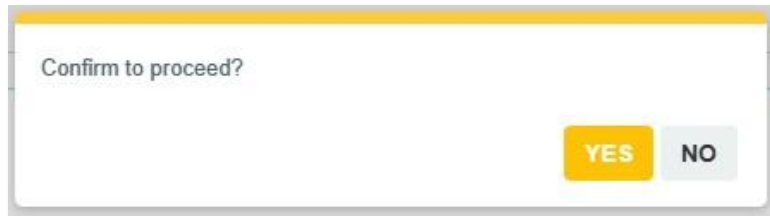


Diagram 590: Confirmation Message

- ii. System will show error message if user does not key-in the comment box.

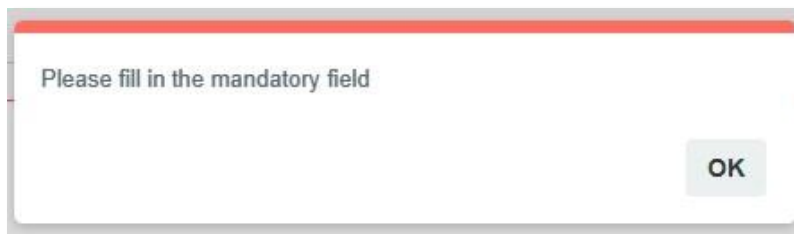



Diagram 591: Error Message

- iii. User click button . System will display successful message.

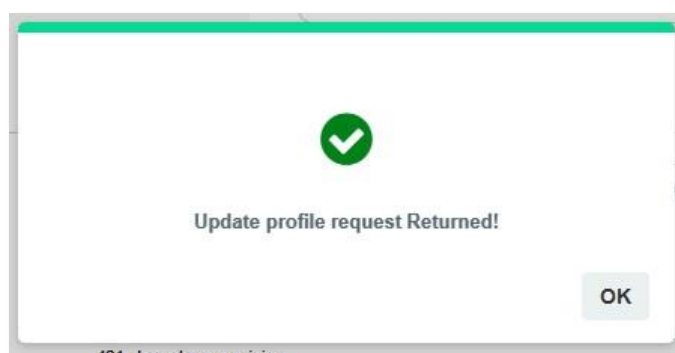





Diagram 592: Successful Message

- vii. System will return the application back to Consultant Maker with status “Returned - Consultant Approver”. System will navigate back to list of applications.

	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	40

12. To reject the application, user click button .
- i. System will prompt message “Confirm to proceed?”. User click button .

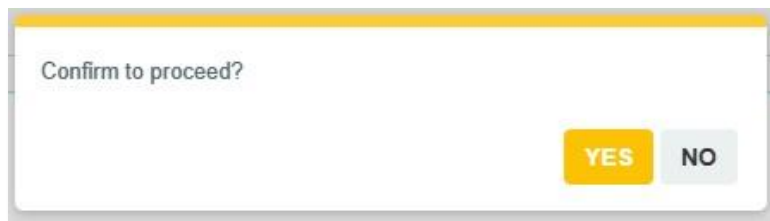


Diagram 593: Confirmation Message

- ii. System will display popup for user to key-in ground of rejection for rejecting consultant application.

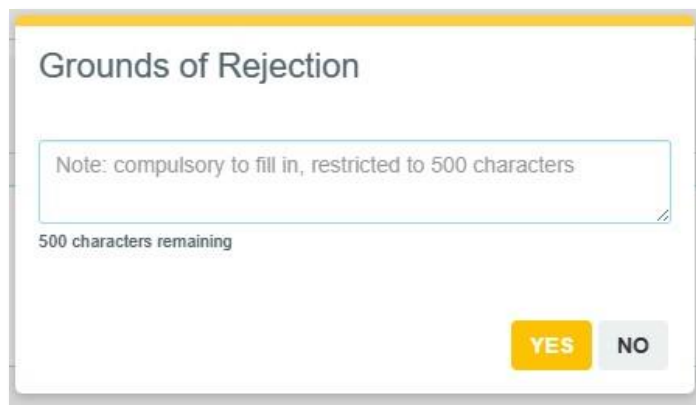

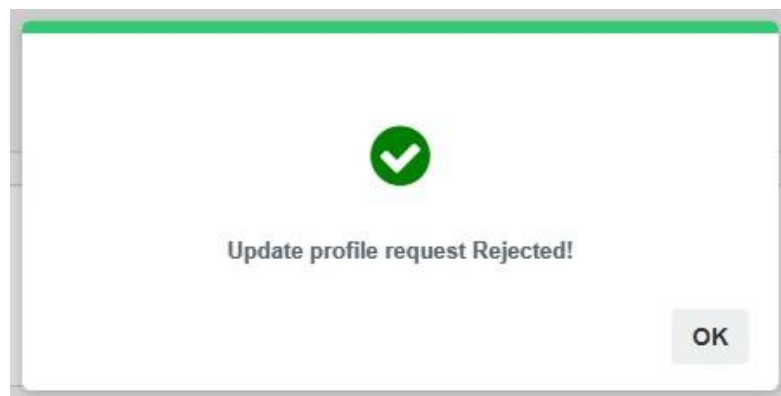


Diagram 594: Grounds of Rejection

- iii. User fill Grounds of Rejection and click . System will prompt successful message and application status change to “Rejected”.




	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	41

Diagram 595: Successful Message

- iv. System will show error message if user does not key-in the ground of rejection.



Diagram 596: Error Message

13. To submit the application, Consultant Approver click button



- i. System will prompt message “Confirm to proceed?” and FIMM RD click





Diagram 597: Confirmation Message

- ii. System will display successful application message and system will navigate back to list of applications. Application status change to “Submitted”.

FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	42

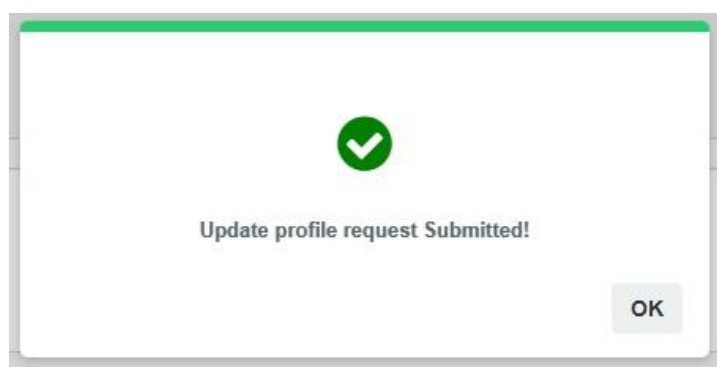



Diagram 598: Successful Application Message

## Failed CAS Screening

1. In List of Profile Update applications under column Action, user

click button  at application with status "Pending CAS Confirmation".

NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	09-Mar-2025	Chen Li Fang	H78901234	F01002001	PRS	Suspended	Profile Update	Pending CAS Confirmation	
2	09-Mar-2025	Zulhilmi Bukhari	F56789012	F01001999	PRS	Active	Profile Update	Returned - RD	

Diagram 599: List of Profile Update applications

2. System will display previously submitted application and consultant details:
  - i. Profile
  - ii. Academic Qualification
  - iii. Scheme Selection
  - iv. Type Of Registration
  - v. Screening
  - vi. Others
3. Under Screening section, user can view failed CAS status.
  - i. For conditional CAS Status, user can see remarks from LRA of the training need to attend to uplift the conditional status.
  - ii. Consultant Approver must approve the application submitted by Consultant Maker to re-direct the submission to RD.




FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	43

Diagram 600: Failed CAS Screening

## Failed Bankruptcy Screening

1. In List of Profile Update applications under column Action, Consultant Approver click

button  at application with status “Pending Bankruptcy Confirmation”.

NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	14-Mar-2025	Jessica Lim	N9012345	F02029223	UTS	Active	Profile Update	Rejected	
2	14-Mar-2025	Umaisrah binti Mansor	001201000121	F02029222	PRS	Active	Profile Update	Pending Bankruptcy Confirmation	

Diagram 601: List of Profile Update applications

2. System will display previously submitted application and consultant:

- Profile
- Academic Qualification
- Scheme Selection
- Type Of Registration
- Screening
- Others

3. Under Screening section, user can view consultant failed Bankruptcy Status.


FIMM Federation of Investment Managers Malaysia	Project	Reference	File	Version	Date	Page
	Federation of Investment Managers Malaysia (FIMM)	ZANKO/FIMM/UM/V0.1	User Manual Document	1.0	24/03/25	44

- i. Consultant Approver must approve the application submitted by Consultant Maker to re-direct the submission to RD.

The screenshot shows a web application interface for FIMM. On the left is a sidebar with a vertical list of steps: 1. Profile Details, 2. Academic Qualifications, 3. Scheme Selection, 4. Type of Registration, 5. Screening (highlighted with a blue circle), and 6. Others. The main content area is titled 'CAS Screening Detail'. It contains a 'Status' dropdown menu with 'Clear' as the selected option. Below this is a section titled 'Bankrupt Status' which is highlighted with a red rectangular box. This section contains a 'Status' dropdown menu with 'Bankrupt' selected, and a 'Bankrupt Release Letter' field with a 'Choose File' button and a 'N...SEN' label. At the bottom of the form, there are navigation arrows: a left arrow and a right arrow.

Diagram 602: Failed Bankruptcy Screening

## Returned – RD


1. In List of Consultant under column Action, user click button  at application with status “Returned – RD”.

NO	SUBMISSION DATE	CONSULTANT NAME	NRIC/PASSPORT NO	FIMM NO	SCHEME	REGISTRATION STATUS	APPLICATION TYPE	STATUS	ACTION
1	09-Mar-2025	Chen Li Fang	H78901234	F01002001	PRS	Suspended	Profile Update	Pending CAS Confirmation	
2	09-Mar-2025	Zulhilmi Bukhari	F56789012	F01001999	PRS	Active	Profile Update	Returned - RD	


Diagram 603: List of Update Profile applications

2. System will display previously returned application.

- i. Profile Details
  - a. Name
  - b. NRIC/Passport No
  - c. Nationality
  - d. Date Of Birth
  - e. Age
  - f. Race
  - g. Gender
  - h. Address
  - i. Postcode
  - j. City

	Project	Reference	File	Version	Date	Page
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- k. State
  - l. Phone Number
  - m. Alt Phone Number
  - n. Email Address
  - o. Photo
- ii. Academic Qualification:
  - a. SPM/SVM
  - b. STPM/STAM
  - c. Diploma
  - d. Degree
  - e. Master
  - f. PhD
- iii. Scheme Selection
  - a. Registration Status
  - b. Distribution Point
  - c. Distributor Selection
- iv. Type Of Registration
  - a. Examination
  - b. Exemption
- v. Screening
  - a. CAS Screening (Clear/whitelist/Under Investigation/Watchlist/Barred/Suspension – Under Investigation/Suspension – Sanctioned/Blacklist)
  - b. Bankruptcy Screening (Clear/Bankrupted)
- vi. Others
  - a. Supporting Document
  - b. Signed Consent Form
  - c. Declaration
- vii. Return Comment (This field should have comment provided by FIMM RD)

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1

Profile Details

2

Academic Qualifications

3

Scheme Selection

4

Type of Registration

5

Screening

6

Others

CAS Screening Detail

Status

Clear

Bankrupt Status

Status

Clear

Return Comment

Update Profile Application by Distributor returned due to incomplete documents.

Comment

500 characters remaining

Diagram 604: Returned – RD