

ASSOCIATE ESTATE PLANNING PRACTITIONER (AEPP)

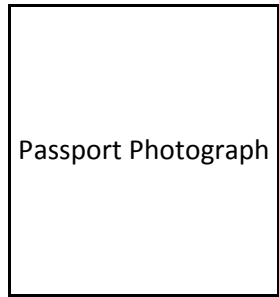
APPLICATION & REGISTRATION FORM



Estate
Planning
Practitioners
Limited



AEPP APPLICATION & REGISTRATION FORM



Please fill up the form with CAPITAL LETTERS and tick (✓) where applicable

PERSONAL INFORMATION

Name

NRIC No. (New)

(Old)

Date of birth

d	d	/	m	m	/	y	y	y	y
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Gender Male Female

Marital Status Single Married Widow/er Divorced

Race Malay Chinese Indian Others

Permanent Address

Correspondence Address (if different from the above)

Contact No. Home

Office

Mobile

Fax

Email

Qualification Master Degree Diploma STPM SPM

CFP RFP Others, please specify

Details of qualification

Occupation

 No. of years service year(s) month(s)

Company name

Industry Insurance Unit Trust Investment Estate Planning

Others, please specify

Description of work

How did you get to know about AEPP? Magazines Newspapers Friend Rockwills
 Others, please specify

CONVERSION COURSE APPLICATION

AEPP conversion course is available to individual who has completed Rockwills' Will & Trust Training

** A copy of the certificate needs to be submitted prior to attending the conversion course.*

Qualification Rockwills PEP Rockwills PA
 No. of year(s) doing Financial Planning year(s) month(s)
 No. of year(s) doing Estate Planning year(s) month(s)

Brief description of experience in estate planning

DOCUMENTS REQUIRED

The following documents need to be submitted together with the application & registration at least one week before the commencement of the course. Late submission will not be entertained.

- a) Photocopy of NRIC
- b) Photocopy of highest academic qualification
- c) Photocopy of Will & Trust Training's certificate of attendance for those who apply for conversion course
- d) 1 passport size photo

IMPORTANT NOTES:

- * **EPPL** reserves the rights to reject the application & registration form with incomplete information.
- * **Rockwills** reserves the rights to cancel or postpone the training subject to the number of registered participants.
- * All **ORIGINAL** Application & Registration Form, required documents and payment must be sent in to the following person at least 2 weeks before the commencement of the class. Late submission will not be entertained.

Miss. Liew Fui Yee or Miss. Vian Yee
Rockwills Corporation Sdn Bhd
 Wisma Rockwills
 No. 62, Jalan 2/131 A, Off Jalan Klang Lama, 58200 Kuala Lumpur

** For further enquiries, please contact Miss. Liew Fui Yee or Miss. Vian Yee at 03-77811993 or email to fuiyee@rockwills.com or vianyee@rockwills.com*

DECLARATION

I confirm and declare that the details provided above are true and accurate to the best of my knowledge. I have also read and agree to abide by terms and conditions herein.

Signature
 Name Date

FOR OFFICE USE

Documents received	<input type="checkbox"/> Payment	
	<input type="checkbox"/> Application & Registration Form	
	<input type="checkbox"/> Photocopy of NRIC	
	<input type="checkbox"/> 1 passport size photograph	
	<input type="checkbox"/> Photocopy of highest academic qualification	
	<input type="checkbox"/> Photocopy of Will & Trust Training's certificate of attendance	
Course	<input type="checkbox"/> Full course (3 days)	<input type="checkbox"/> Conversion course (1 day)
Conversion Approval	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Training date	<input type="text"/>	Certification No. <input type="text"/>
Venue	<input type="checkbox"/> WR KL	<input type="checkbox"/> WR Penang
	<input type="checkbox"/> KK	<input type="checkbox"/> Kuching
		<input type="checkbox"/> Others <input type="text"/>
Exam Result	<input type="text"/>	Trainer <input type="text"/>
Amount Received	<input type="text"/>	Receipt No. <input type="text"/>
Approved by	<input type="text"/>	
Date	<input type="text"/>	
Remarks	<input type="text"/>	



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