

# AGENCY PRO (UTC & PRC ONLINE PORTAL) USER GUIDE

# LOGIN TO AGENCY PRO

(note : For first time login, please refer to invitation e-mail)



**AgencyPRO**  
Performance. Resources. Online.

Username  
The Username field is required.

Password  
The Password field is required.

☐ Remember me? [Forgot password?](#)

Login

INTERESTED TO REALISE YOUR DREAMS?  
JOIN US AS UNIT TRUST CONSULTANT TODAY!

Onboard Now

"OPPORTUNITIES  
YOU CRE  
- CHRIS

PLASTIC  
DUP

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# AGENCY PRO > HOME > LANDING PAGE

**AgencyPRO** Home Campaign Activities Resources My Recruits My Profile **CPD 0/16** Hi GAM-MAZLINA

**30<sup>TH</sup> ANNIVERSARY AGENCY BONANZA 2024**

**Campaign Period**  
**1 January 2024 – 31 March 2024**

Stand a chance to win  
**2 flight tickets to Bangkok!**

### 1 Training & Events

<b>Nov 2023</b> <b>15</b> Wed	<b>Test 1 - F2F Training</b> <b>OTHER</b> <b>Registered</b> Training Date 15/11/2023 - 29/02/2024 (2 Sessions) 4 Point
<a href="#">View Info</a>	


### 1 e-Learning







<b>Dec 2023</b> <b>15</b> Fri	<b>Code of Ethics e-learning</b> <b>ONLINE</b> Training Date 15/12/2023 - 29/02/2024 3 Point
<a href="#">View Info</a>	




# AGENCY PRO > CAMPAIGN

For UTC/PRC to view  
new and ongoing  
campaigns.

 **HongLeong** Asset Management

**AgencyPRO**  Home  **Campaign**  Activities  Resources  My Recruits  My Profile **CPD 0/16** Hi GAM-MAZLINA


## Campaign



**AGENCY INCENTIVE TRIP SALES CAMPAIGN  
FY2023/2024**

AGENCY INCENTIVE TRIP SALES CAMPAIGN  
FY2023/2024

Campaign Date  
**06/12/2023 - 29/02/2024**




**30th Anniversary Agency Bonanza 2024**

Campaign date from 1/1/2024 to 31/3/2024

Campaign Date  
**01/01/2024 - 01/04/2024**

# AGENCY PRO > ACTIVITIES



AgencyPRO

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Training & Events

e-Learning

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CPD 0/16

Hi GAM-MAZLINA

30

ANNIVERSARY

AGENCY BONANZA


2024


Campaign Period


1 January 2024 – 31 March 2024

Stand a chance to win

2 flight tickets to Bangkok!







1 Training & Events

Test 1 - F2F Training

Nov 2023

OTHER


Registered

1 e-Learning

Code of Ethics e-learning

Dec 2023








ONLINE



For Agency Training use only. Not for Public circulation

6

# AGENCY PRO > ACTIVITIES > TRAINING & EVENTS > My Training

**AgencyPRO**  Home  Campaign  Activities  Resources  My Recruits <sup>1</sup>  My Profile  CPD 0/16 Hi GAM-MAZLINA ▾

## Training & Events

[My Training](#) | [Upcoming Training](#) | [History](#)

Nov 2023


15

Wednesday

### Test 1 - F2F Training

✓ Registered

Training Date  
15/11/2023 - 29/02/2024 (2 Sessions)

 4 Point

For UTC/PRC to view registered upcoming training/events

# AGENCY PRO > ACTIVITIES > TRAINING & EVENTS > Upcoming Training

AgencyPRO

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My Profile

CPD 0/16

Hi GAM-MAZLINA

Training & Events

My Training

Upcoming Training

History

Feb 2024

02

Friday

Compliance

Training Date

02/02/2024 - 24/03/2024 (1 Session)

4 Point

For UTC/PRC to view upcoming training/event



# AGENCY PRO > ACTIVITIES > TRAINING & EVENTS > History

## Training & Events

My Training   Upcoming Training   **History**

Show 10 entries

Search:

TITLE	COMPLETED DATE	RESULT	CPD POINTS
Test 1 - F2F Training		Registered	0

Showing 1 to 1 of 1 entries

For UTC/PRC to view training attended & CPD points earned.

# AGENCY PRO > ACTIVITIES > e-LEARNING > Upcoming

## e-Learning

Upcoming


History

### Code of Ethics e-learning

 ONLINE

Training Date

15/12/2023 23:31 - 29/02/2024 23:31

 3 Point

Start

- For UTC/PRC to perform e-learning assessment.
- Click start to answer e-learning assessment & collect CPD points

# AGENCY PRO > ACTIVITIES > e-LEARNING > Upcoming (con't)

AgencyPRO Home Campaign Activities Resources My Recruits My Profile

[← Back to List](#)

### Code of Ethics e-learning

Welcome to "Code of Ethics e-learning" training. Please read through the PDF and answer to the Quiz. Once you pass the quiz, you will earn CPD points.

#### E-Learning

5 of 40 Automatic Zoom

#### Structure Of Revised Code Of Ethics

Chapter 1 : Introduction	Introduces the application, structure and contents of the revised Code Of Ethics.
Chapter 2 : Definition	Provides definition of certain words and abbreviation used in the revised Code Of Ethics.
Chapter 3 : Core Principle of ethical standards and Professional Conducts	Set out 5 core principles. Each core principles are accompanied by positive requirements in the form of behavioural rules for better clarity, understanding and observance of the core principles.
<b>Core Principles</b>	
	<ol style="list-style-type: none"><li>1. Honesty and integrity</li><li>2. Professionalism</li><li>3. Avoidance of Conflict of interest</li><li>4. Disclosure of information</li><li>5. Observance of confidentiality</li></ol>
Chapter 4 : List of Prohibited Conducts	Stipulate various objectionable conducts to accentuate the scope and reach to each core principles
Chapter 5 : Non-Compliance with the code and FIMM rules	Specifies the consequences for failure to comply with requirements of the revised Code Of Ethics and FIMM rules.

[Proceed to Quiz](#)

- Read the e-Learning
- Click 'Proceed to Quiz' to answer quiz & earn CPD points

# AGENCY PRO > ACTIVITIES > e-LEARNING > History

For UTC/PRC to view e-learning attended & CPD points earned.

AgencyPRO

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Upcoming

History

Show 10 entries

Search:

TRAINING	COMPLETED DATE	RESULT	CPD
AML A e-learning	14/02/2024 10:05	Completed	4

Showing 1 to 1 of 1 entries

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# AGENCY PRO > RESOURCES

The screenshot displays the AgencyPRO website interface. The top navigation bar includes the AgencyPRO logo and links for Home, Campaign, Activities, Resources, My Recruits, My Profile, and a CPD progress indicator (0/16). The user is logged in as Hi GAM-MAZLINA. The Resources dropdown menu is open, showing options for Memo & Updates, Announcement, and Information & Forms. Below the navigation bar, a large banner celebrates the 30th Anniversary Agency Bonanza 2024. The banner features a colorful design with balloons and text announcing a Campaign Period from 1 January 2024 to 31 March 2024. A green box on the banner states: "Stand a chance to win 2 flight tickets to Bangkok!". A circular inset shows a Bangkok skyline with the text "BANGKOK The Land of Smiles".



# AGENCY PRO > RESOURCES > MEMO & UPDATES

Shout Out

Show 10 entries

Search:

TITLE	CATEGORY	START DATE	END DATE
<a href="#">GAM - Memo 1</a>	Shout Out	12/12/2023 09:12	29/02/2024 09:02

Showing 1 to 1 of 1 entries

Previous1Next

# AGENCY PRO > RESOURCES > Announcement

## Announcement

Click the box to view and download the contents



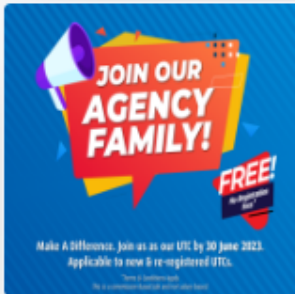
### 30th Anniversary Agency Bonanza 2024

New Campaign for All



### Online Account Opening Campaign

Launch of Online Account Opening Campaign



### Jom Join HLAM Promotion

Join Our Agency Family! Zero Joining Fees. Limited to 100 new recruits only!

# AGENCY PRO > RESOURCES > INFORMATION & FORMS

## Forms

Show 10 entries

Search:

TITLE	START DATE	END DATE
<a href="#">Hong Leong Private Retirement Scheme (PRS) - New Version of Forms</a>	06/12/2023 18:32	29/02/2024 18:32

Showing 1 to 1 of 1 entries

Previous 1 Next

## UTC Handbook

Show 10 entries

Search:

TITLE	START DATE	END DATE
<a href="#">Resource Test 2</a>	08/11/2023 17:04	31/03/2024 17:04

Showing 1 to 1 of 1 entries

Previous 1 Next

Click the title to view the form

# AGENCY PRO > MY RECRUITS

The screenshot displays the AgencyPRO web application interface. The top navigation bar includes the AgencyPRO logo, a Home icon, a Campaign icon, an Activities icon, a Resources icon, a My Recruits icon with a red notification badge showing '1', a My Profile icon, a CPD 0/16 indicator, and a user greeting 'Hi GAM-MAZLINA'. A red circle highlights the 'My Recruits' dropdown menu, which contains two options: 'My Pending Recruits' and 'My Recruits List'. Below the navigation bar, a large banner for the '30TH ANNIVERSARY AGENCY BONANZA 2024' is visible. The banner features colorful balloons and text announcing a 'Campaign Period' from '1 January 2024 – 31 March 2024'. It also promotes a contest where users can 'Stand a chance to win 2 flight tickets to Bangkok!' and includes a small image of Bangkok with the text 'BANGKOK The Land of Smiles'.

# AGENCY PRO > MY RECRUITS > MY PENDING RECRUITS

AgencyPRO



Home



Campaign



Activities



Resources



My Recruits

## 1 Pending Application(s) for Approval/Action

Show 10 entries

Search:

APPLICATION ID	APPLICANT ID	APPLICANT NAME	APPLICATION DATE	REGISTRATION TYPE	WORKFLOW STAGE	ACTION
UTC86	810101125001	CHEAH YEN LI - RECRUITER	22/01/2024 11:14	Exemption of CUTE	Upline Approval	<div>Approve</div> <div>Reject</div>

Showing 1 to 1 of 1 entries

Previous 1 Next

For upline and recruiter to assign rank and recommend new recruits to join HLAM as their downline.



# AGENCY PRO > MY RECRUITS > MY RECRUITS LIST

## Application Listing

Show 10  entries

APPLICATION ID	APPLICANT ID	APPLICANT NAME	APPLICATION DATE	REGISTRATION TYPE	STATUS	UPLINE
<a href="#">UTC89</a>	890101015004	AM-MAZLINA 5	05/02/2024 14:59	New Registration	Approved	Recruiter & Upline
<a href="#">UTC86</a>	810101125001	CHEAH YEN LI - RECRUITER	22/01/2024 11:14	Exemption of CUTE	Pending	Recruiter & Upline
<a href="#">UTC85</a>	780101106001	Cheah Yen Li	22/01/2024 11:02	Re-sit (within 3 months)	Pending	Recruiter & Upline
<a href="#">UTC82</a>	560123145008	UTC-Mazlina3	03/01/2024 11:37	New Registration	Approved	Upline
<a href="#">UTC73</a>	990101129002	UTC-MAZLINA2	18/12/2023 09:51	Re-registration (within FiMM renewal year)	Approved	Recruiter & Upline
<a href="#">UTC63</a>	650112105001	UM_MAZLINA	07/12/2023 16:43	Exemption of CUTE	Approved	Upline
<a href="#">UTC62</a>	750123125006	AM-MAZLINA	06/12/2023 13:41	Re-registration (less than 3 years)	Approved	Recruiter & Upline

Showing 1 to 7 of 7 entries

Previous 1 Next

For upline & recruiter to view the list of UTC/PRC under their agency.

# AGENCY PRO > MY PROFILE

AgencyPRO

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My Recruits

My Profile

CPL 3/16

Hi SUZY

30<sup>TH</sup>  
ANNIVERSARY  
AGENCY BONANZA  
2024

Campaign Period

1 January 2024 – 31 March 2024

Stand a chance to win  
2 flight tickets to Bangkok!



BANGKOK  
The Land of Smiles

# AGENCY PRO > MY PROFILE > MY INFO (UTC) > UTC INFO

My Info (UTC)

UTC Info

Emergency Contact

Hierarchy

CPD Point

QR Code

UTC Info

Name

SUZY WONG

\* As per NRIC/Passport

NRIC/Passport No

780103071234

UTC Code

47400601

Correspondence Address

1 JALAN SS21

City

PETALING JAYA

Postcode

47400

State

SELANGOR

Country

MALAYSIA

Telephone (Mobile)

018-2992456

Telephone (Office)

Telephone (Home)

Telephone (Fax)

Email

natalienuai@hlib.hongleong.com.my

Gender

Female

Date of Birth

03/01/1978

# AGENCY PRO > MY PROFILE > MY INFO (UTC) > EMERGENCY CONTACT

My Info (UTC)

UTC Info

Emergency Contact

Hierarchy

CPD Point

QR Code

Emergency Contact

Name

DESMOND CHAN

\* As per NRIC/Passport

NRIC

690206075111

Address

11A LORONG BATU TAMAN BUNGA

City

TANJONG BUNGAH

Postcode

11200

State

MALAYSIA

Country

PULAU PINANG

# AGENCY PRO > MY PROFILE > MY INFO (UTC) > HIERARCHY

My Info (UTC)

UTC Info

Emergency Contact

Hierarchy

CPD Point

QR Code

Hierarchy

DOWNLINE CODE	DOWNLINE NAME	UPLINE CODE	UPLINE NAME	DOWNLINE RANK	DOWNLINE STATUS	RECRUITER NAME	ACHIEVE POINT	EARNED POINT	DOWNLINE TYPE
47400602	WILLIAM CHAN	47400601	SUZY WONG	UNIT TRUST CONSULTANT	Active	SUZY WONG	16.00	0.00	Direct



AGENCY PRO > MY PROFILE > MY INFO (UTC) > CPD POINT

My Info (UTC)

UTC Info

Emergency Contact

Hierarchy

CPD Point

QR Code

CPD Point

Points to Achieve

15

Points Earned

0

Balance Points

15

Show 10 entries

Search:

TRAINING NAME	DATE	POINTS EARNED	REMARKS
Code of Ethics e-learning	23/01/2024 19:28	3	

Showing 1 to 1 of 1 entries

Previous

1

Next

AGENCY PRO > MY PROFILE > MY INFO (UTC) > QR CODE

My Info (UTC)

UTC Info


Emergency Contact

Hierarchy

CPD Point

QR Code

QR Code



# AGENCY PRO > MY PROFILE > MY INFO (PRC) > PRC INFO

## My Info (PRC)

PRC Info

Emergency Contact

Hierarchy

QR Code

### PRC Info

Name

SUZY WONG

*\* As per NRIC/Passport*

NRIC/Passport No

780103071234

PRC Code

P0000003

Correspondence Address

1 JALAN SS21

City

PETALING JAYA

Postcode

47400

State

SELANGOR

Country

MALAYSIA

Telephone (Mobile)

018-2992456

Telephone  
(Office)

Telephone (Home)

Telephone (Fax)

Email

natalienuai@hlib.hongleong.com.my

Gender

Female

Date of Birth

03/01/1978

# AGENCY PRO > MY PROFILE > MY INFO (PRC) > EMERGENCY CONTACT

My Info (PRC)

PRC Info

Emergency Contact

Hierarchy

QR Code

Emergency Contact

Name

DESMOND CHAN

\* As per NRIC/Passport

NRIC

690206075111

Address

11A LORONG BATUTAMAN BUNGA

City

TANJONG BUNGAH

Postcode

11200

State

MALAYSIA

Country

PULAU PINANG

# AGENCY PRO > MY PROFILE > MY INFO (PRC) > HIERARCHY

## My Info (PRC)

PRC Info   Emergency Contact   **Hierarchy**   QR Code

### Hierarchy

DOWNLINE CODE	DOWNLINE NAME	UPLINE CODE	UPLINE NAME	DOWNLINE RANK	DOWNLINE STATUS	RECRUITER NAME	ACHIEVE POINT	EARNED POINT	DOWNLINE TYPE
P0000004	KAREN WONG	P0000003	SUZY WONG	UNIT MANAGER	Active	SUZY WONG	0.00	0.00	Direct
P0000005	WILLIAM CHAN	P0000004	KAREN WONG	PRIVATE RETIREMET SCHEME CONSULTANT	Active	KAREN WONG	0.00	0.00	Indirect



# AGENCY PRO > MY PROFILE > MY INFO (PRC) > QR CODE

My Info (PRC)


PRC Info

Emergency Contact

Hierarchy

QR Code

QR Code



# AGENCY PRO > MY PROFILE > APPLY PRC NOW!

The screenshot displays the AgencyPRO website interface. At the top, the navigation bar includes the AgencyPRO logo, a Home icon, a Campaign icon, an Activities dropdown, a Resources dropdown, a My Profile dropdown, a CPD 0/16 indicator, and a user profile for Hi UTC-MAZLINA3. The main content area features a large, colorful banner for the '30TH ANNIVERSARY AGENCY BONANZA 2024' on the left. On the right, a 'My Info (UTC)' dropdown menu is open, showing an 'Apply PRC Now!' button. Below this, a 'Campaign Period' announcement states '1 January 2024 to 31 March 2024'. A blue callout bubble points to the 'Apply PRC Now!' button, containing the text: 'For UTC to submit application as Private Retirement Scheme Consultant (PRC)'. The banner also includes a 'Bangkok The Land of Smiles' logo.

# AGENCY PRO > APPLY PRC NOW! > Registration Type

AgencyPRO



Home



Campaign



Activities



Resources



My Profile

CPD 0/16

Hi UTC-MAZLINA3

## Registration Type

Please choose your preferred registration type to continue

Select 'Registration Type'

### New Registration

Fees: RM200.00

- Newly join as Private Retirement Consultant

CHOOSE

### Re-Sit (Within 3 Months)

Fees: RM170.00

- Registered as Unit Trust Consultant and required to seat for CPRE exam but failed
- Re-take CPRE exam within 3 months from earlier CPRE exam date

CHOOSE

### Re-Registration (Less Than 3 Years)

Fees: RM100.00

- Former Private Retirement Consultant that not attached to any UTMC for less than 3 years

CHOOSE

### Exemption Of CUTE

Fees: RM100.00

### Re-Registration (Within FiMM

Renewal Year)

# PRC Application Form

AgencyPRO



Home



Campaign



Activities ▾



Resources ▾



My Profile ▾

CPD 0/16

Hi UTC-MAZLINA3 ▾

## PRC Application Form

Please fill in all required(\*) fields.

1

Applicant Information

2

Declaration

Select 'Applicant Information' and fill-in information required.

### UPLINE & RECRUITER INFORMATION

Upline Code

Upline Name

Recruiter Code

Recruiter Name

### PARTICULARS OF APPLICANT

Name \*

UTC-MAZLINA3

# PRC Application Form > Attachment

ATTACHMENT ?

IC *	Choose File	No file chosen
IC (Selfie) *	Choose File	No file chosen
Academic Certificates *	Choose File	No file chosen
Academic Certificates (Selfie) *	Choose File	No file chosen
Additonal Document	Choose Files	No file chosen

Upload documents required and click 'Next'

NOTE

The following information will be based on the records of your UTC in Hong Leong Asset Management Bhd ("HLAM") system

Residential Address/Correspondence Address, Telephone Number (Mobile/Office/Home), Fax, Email, Address, Date of Birth, Gender, Occupation, Marital Status, Hong Leong Bank A/C No. (for commission payment purpose), Particulars of Emergency Contact and Working Experience.

If you wish to update your latest information, please complete the ["Change of Address/Bank Account No./Telephone No./Update of Signature"](#) Form and submit the original form to HLAM

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# PRC Application Form > Declaration

## PRC Application Form

Please fill in all required(\*) fields.

1

Applicant Information

2

Declaration

Please read and submit the documents required within the timeline given

### DECLARATION

☒ I accept the Terms of Service

- I declare that the information given is true and correct. Any false information or any information withheld may lead to immediate termination of any agreement or contract that I may have with Hong Leong Asset Management ("HLAM").
- I hereby agree that all information herein will be used for communication between HLAM and your recruiter/upline.
- I hereby agree to bear the fee incurred for my registration with HLAM and Federation of Investment Malaysia (FIMM).
- I agree and acknowledge that my Agency Agreement with HLAM shall be applicable to Private Retirement Scheme. In respect of my appointment as a Private Retirement Scheme Consultant, I shall comply, bound and continue to be bound by all terms and conditions spell out in Agency Agreement.
- I agree and acknowledge my Unit Trust Consultant Privacy Policy with HLAM shall be applicable to Private Retirement Scheme.
- Please download the following documents, fill in all information required and submit the original copy to HLAM within five (5) business day from the submission of this online registration;
  1. [Privacy Policy](#).
  2. [Statutory Declaration](#).
  3. [FIMM - Application for Registration of Unit Trust Scheme Consultant](#).
  4. [FIMM - Consent Form](#).
  5. [Submission of Photograph – Please provide three \(3\) copies of passport size photograph](#).

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Submit

# PRC Application Form > Payment

## Payment

Please make payment to complete your registration.

**i** Please make payment to following Merchant Name and Account Number with amount stated below. As a proof of payment, please attach the payment receipt in this form and submit.

Merchant Name: Hong Leong Asset Management

Bank Account Number: 123456789

Net Charges(RM): 200.00

Payment For: New Registration

Payment Receipt **i**: Choose File No file chosen

Submit

- Please make payment to the A/C number provided  
- Attach 'Payment Receipt & click 'Submit'

# PRC Application Form > Application submitted

AgencyPRO



Home



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Activities ▼



Resources ▼

LINEA3 ▼

After your application submitted to HLAM, a notification e-mail will be sent to you. Please check your e-mail inbox for further action

## Thank You!!

Your application have been submitted. Your Application ID is **PRC176**. For any enquiries, please contact us at 03-2081 8600 or email to [central@hlam.hongleong.com.my](mailto:central@hlam.hongleong.com.my)

# PRC Application Form > e-mail notification

Private Retirement Consultant Application External > Inbox x

No-Reply@hiam.com.my <No-Reply@hiam.com.my>  
to me

12:01 PM (0 minutes ago) ☆ ↶ ⋮

**HongLeong Asset Management**

**Private Retirement Consultant Application**

Dear Mr/Ms,

Your preliminary application PRC176 to become a Private Retirement Consultant (PRC) of Hong Leong Asset Management has been received and processed successfully!

We would like to bring to your attention that your application is currently pending for processing and approval.

To complete the processing of your application, please submit the following compulsory documents to us within five (5) working days.

1. FIMM's Application Form\*
2. FIMM's Consent Form\*
3. Statutory Declaration\*
4. Submission of Photograph Form\*
5. Three (3) copies of Passport Size Photograph
6. Agency Agreement (please refer to the attachment)
7. Proof of payment (If you have submitted during preliminary application, please ignore)

Note: \* You may download the document above from <https://u.echannel.hiam.com.my/agencypro/Forms//Forms>.

Once completed, please submit the original forms to the below address;

Hong Leong Asset Management Bhd  
Level 18, Block B, Plaza Zurich  
No. 12 Jalan Gelenggang  
Bukit Damansara  
50490 Kuala Lumpur  
Attention: Agency Sales Support

We appreciate your prompt attention to this matter as it will enable us to expedite the processing of your application.

Should you have any enquiry, please do not hesitate to reach out to our Agency Sales Support team at [central@hiam.hongleong.com](mailto:central@hiam.hongleong.com).

Thank you for registering to become a PRC of HLAM.

Please read and submit the documents required within the timeline given

# PRC Application Form > e-mail notification upon PRC Code generated

