

# UNIT TRUST CONSULTANT (UTC) ONBOARDING (USER GUIDE)

# QUALIFICATIONS TO BECOME A UNIT TRUST CONSULTANT

1

At least 21 years old

2

Obtained at least 3 credits in SPM

3

Fulfill all the requirements in the rules as set out by FIMM



*Free photo source: freepik.com*

# QUALIFICATIONS TO BECOME A UNIT TRUST CONSULTANT

The individual should be honest, of good character, and good repute. Further, he must also be efficient, reliable, and possess a high level of integrity. He must not have been:

- (a) found by a court or other competent authority to have acted fraudulently or dishonestly;
- (b) convicted of a criminal offence; or
- (c) censured or reprimanded by, or denied/disqualified from membership of, a professional or trade body; or a regulatory license, registration or similar approval has been refused or revoked.

## DOCUMENTS REQUIRED TO REGISTER as UTC

1. Passport size photos x 3pcs

2. NRIC copy (front & back)

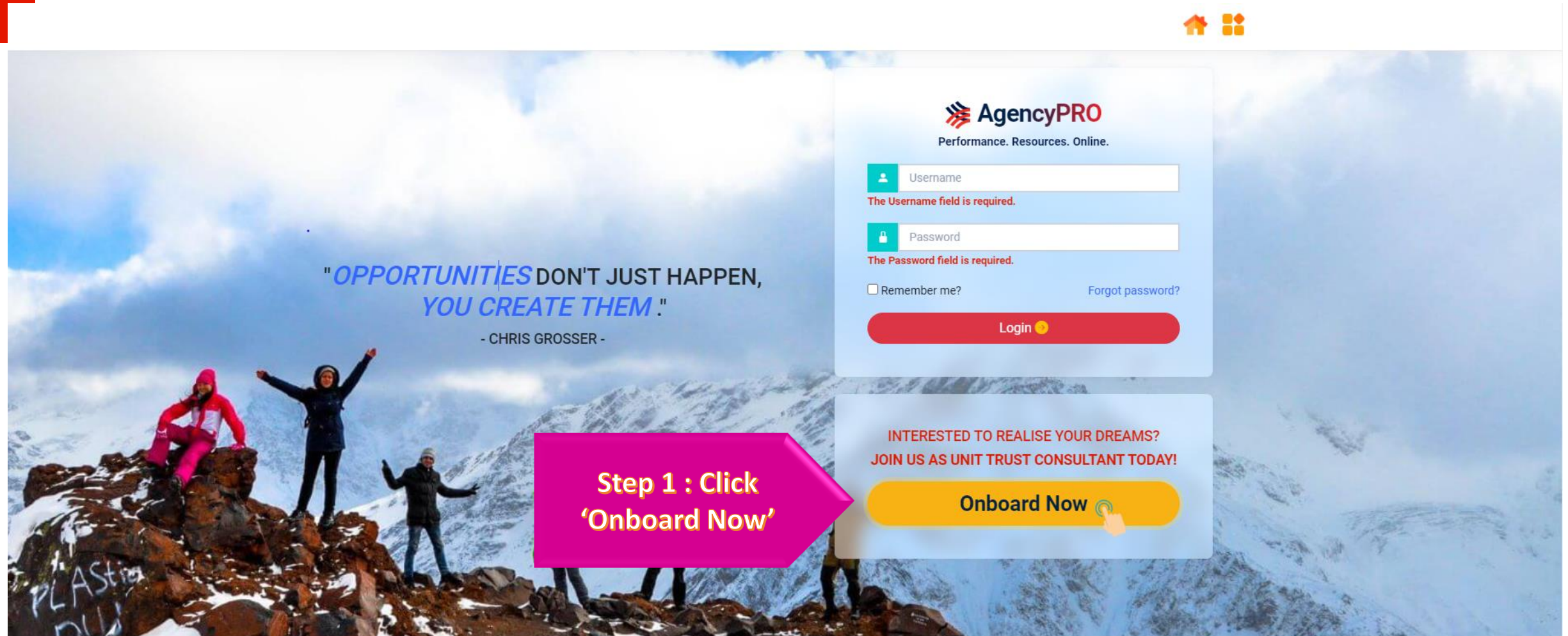
3. SPM or higher education certificate

4. Hong Leong Bank Statement (Commission)

5. Registration Fee



# ACCESS to AGENCY PRO



The image shows a screenshot of the AgencyPRO website. The background is a scenic view of a snowy mountain peak with three people standing on a rocky outcrop. The sky is blue with white clouds. In the top right corner, there are two small icons: a house and a grid of four squares. The main content area is divided into two sections. The top section is a light blue box containing the AgencyPRO logo, the tagline 'Performance. Resources. Online.', and a login form. The login form has two input fields: 'Username' and 'Password'. Below the 'Username' field, there is a red error message: 'The Username field is required.' Below the 'Password' field, there is a red error message: 'The Password field is required.' There is also a 'Remember me?' checkbox and a 'Forgot password?' link. A red 'Login' button is at the bottom of the login form. The bottom section is a light blue box containing the text 'INTERESTED TO REALISE YOUR DREAMS? JOIN US AS UNIT TRUST CONSULTANT TODAY!' and a yellow 'Onboard Now' button with a hand cursor icon. A pink arrow points from the text 'Step 1 : Click 'Onboard Now'' to the 'Onboard Now' button. At the bottom of the page, there is a copyright notice: 'Copyright © Hong Leong Asset Management Bhd [199401033034 (318717-M)] Reserved | Terms of Use | Disclaimer'.

"*OPPORTUNITIES* DON'T JUST HAPPEN,  
*YOU CREATE THEM*."  
- CHRIS GROSSER -

**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

Step 1 : Click 'Onboard Now'

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# Step 2 : Select your Registration Type



## Registration Type

Please choose your preferred registration type to continue

### New Registration Fees: RM200.00

- Newly join as Unit Trust Consultant

CHOOSE

### Re-Sit (Within 3 Months) Fees: RM170.00

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

CHOOSE

### Re-Registration (Less Than 3 Years) Fees: RM100.00

- Former Unit Trust Consultant that not attached to any UTMC for less than 3 years

CHOOSE

### Exemption Of CUTE Fees: RM100.00

- An individual who fulfils any of the following qualifications;
  - Certified Chartered Financial Planner (CFP)/ Islamic Financial Planner (IFP)
  - Registered Financial Planner (RFP)/ Shariah Registered Financial Planner (Shariah RFP)
  - Chartered Financial Consultant (ChFC)
  - Complete relevant modules of CFP, IFP, RFP or Shariah RFP

CHOOSE

### Re-Registration (Within FiMM Renewal Year) Fees: RM30.00

- Former Unit Trust Consultant who has paid current year annual fee at the point of renewal



CHOOSE

# Step 3 : Key-in your e-mail address & NRIC for verification purpose



## Verification

Please provide your Email Address and Identification Number for verification

	<input type="text" value="Email Address"/>
	<input type="text" value="NRIC"/>

Verify

# Step 4 : Click 'Verify'



## Verification

Please provide your Email Address and Identification Number for verification



mazlinabahmad@hlam.hongleong.com.my



890101015004

Verify



# Step 5 : Please obtain your code from your e-mail inbox



Unit Trust Consultant Registration - Email Verification External > Inbox x



No-Reply@hlam.com.my <No-Reply@hlam.com.my>  
to me ▾

2:42 PM (1 minute ago)



 **HongLeong Asset Management** 

**Unit Trust Consultant Registration - Email Verification**

Dear Mr/Ms,

Your email verification code is **983115**

Please return to email verification page and enter the above code to resume your registration.

Thank you.

## Step 6 : Enter Verification Code & Click 'Submit'

**HongLeong Asset Management**

Home Menu

### Email Verification

Please enter the verification code you received at **mazlinabahmad@hlam.hongleong.com.my**

**Submit**

Please provide your Email Address and Identification Number for verification

**Verify**

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# Step 7 : Please fill-in 'Applicant Information'



## UTC Application Form

Please fill in all required(\*) fields.

1

Applicant Information

2

Emergency Contact

3

Declaration

### UPLINE & RECRUITER INFORMATION

Upline Code

Upline Name

Recruiter Code

Recruiter Name

### PERSONAL INFORMATION

Name \*

## Step 8 : Attach documents required & Click 'Next'

	ATTACHMENT ?
IC *	<div>Choose File</div> A_105_OD_880808085888_F.png
IC (Selfie) *	<div>Choose File</div> A_105_OD_880808085888_F.png
Academic Certificates *	<div>Choose File</div> A_105_OD_880808085888_F.png
Academic Certificates (Selfie) *	<div>Choose File</div> A_105_OD_880808085888_F.png
HLB/HLISB Account Statement	<div>Choose File</div> No file chosen
Agency Structure (if any)	<div>Choose File</div> No file chosen
Additional Document	<div>Choose Files</div> No file chosen

Next

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# Step 9 : Please fill-in 'Emergency Contact' information & Click 'Next'



### UTC Application Form

Please fill in all required(\*) fields.

1

2

3

Applicant Information

Emergency Contact

Declaration

#### EMERGENCY CONTACT

Name \*

\* As per NRIC/Passport

NRIC No \*

Old NRIC No./Passport No.

Residential Address \*

City \* Postcode \*

State \* Choose... Country \* MALAYSIA

☐ Same as Residential Address (Please tick if applicable)

Correspondence Address (if different from above)

City Postcode

State Choose... Country MALAYSIA

Mobile No. \* Home No.

Relationship \*

BackNext

# Step 10 :

## Please read and Click 'Submit'

### UTC Application Form

Please fill in all required(\*) fields.

1

Applicant Information

2

Emergency Contact

3

Declaration

#### DECLARATION

☒ **The Applicant hereby declares, confirms and agrees:-**

- 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 communications 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").
- 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. Agency Agreement.
  2. [Privacy Policy](#).
  3. [Statutory Declaration](#).
  4. [FIMM - Application for Registration of Unit Trust Scheme Consultant](#).
  5. [FIMM - Consent Form](#).
  6. [Submission of Photograph – Please provide three \(3\) copies of passport size photograph](#).

Back

Submit

# Step 11 : - Please make payment to the A/C number provided

## - Attach 'Payment Receipt & Click 'Submit'



### Payment

Please make payment to complete your registration.



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 ⓘ :	<input type="button" value="Choose File"/> No file chosen

Submit

Step 12 : 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 **UTC89**. For any enquiries, please contact us at 03-2081 8600 or email to [central@hlam.hongleong.com.my](mailto:central@hlam.hongleong.com.my)



# Step 13 :


## Please read and submit the documents required within the timeline given

Unit Trust Consultant Application External > Inbox x



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

3:04 PM (2 minutes ago) ☆ ↶ ⋮

**HongLeong Asset Management**

**Unit Trust Consultant Application**

Dear Mr/MS,

Your preliminary application UTC89 to become a Unit Trust Consultant (UTC) of Hong Leong Asset Management Berhad ("HLAM") has been submitted successfully!

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

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.hlam.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@hlam.hongleong.com](mailto:central@hlam.hongleong.com).

## Step 14 :



Once registration with FIMM & HLAM completed, you will receive an e-mail to inform you on your UTC's details and login ID to Agency PRO.

Unit Trust Consultant Application - Successful External Inbox x

 **No-Reply@hlam.com.my** <No-Reply@hlam.com.my>  
to me

4:19 PM (0 minutes ago) ☆ ↩ ⋮

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 **HongLeong Asset Management** 

**Unit Trust Consultant Application - Successful**

Dear Mr/Ms,

Congratulations and welcome onboard with Hong Leong Asset Management ("HLAM").

Append below are your Agency rank and codes with HLAM and Federation of Investment Managers Malaysia ("FIMM") which are important for you to take note:-

Rank : **UNIT MANAGER**  
UTC Code (HLAM) : **48020615**  
FIMM Code : **016-0-7854**

As you are new to HLAM, we would like to introduce to you some of the useful information to guide you to embark your journey with HLAM:-

1. HLAM Agency PRO portal  
An online portal to view all information related to your agency.  
Please click below button to access to the Agency PRO;

Your Login ID : **48020615**

[Complete Registration](#)

User guide is available in Agency Pro portal.

2. Sales Kit for New UTC
  - A sales presentation tool for UTC to provide an insight of Unit Trust investment and HLAM's Unit Trust funds to prospective clients.