

Skills Framework for Financial Services

Programmes that broaden or deepen specific skills and knowledge
for the various job roles in the sector

Sales, After Sales, Distribution and Relationship
Management

Job Role:
Relationship Manager - Retail Banking/Personal Banking Manager

Full Qualification Programmes	Providers
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Technical Skills and Competencies (TSC)			Modular Programmes	Providers
Category	Title	Proficiency Level		
Customer Relationship and Stakeholder Management	Account Management	4	Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Certificate in Trust Services (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
Investment and Financial Management	Business Environment Analysis	4	Making Investments Work	CyberQuote Pte Ltd
			Mastering Price Action	CyberQuote Pte Ltd
			SGX CSP Module 4: Technical Analysis	Singapore Exchange Limited
Business Development and Strategy Management	Business Negotiation	4	Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			AWMP Programme II - Investment Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
			AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Business Development and Strategy Management	Business Opportunities Development	4	Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
Risk Management, Governance and Regulatory Compliance	Business Risk Assessment	3	IBF Standards Operational Risk Management Level 1	National University of Singapore - Risk Management Institute
Business Development and Strategy Management	Change Management	4	Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 1	Nanyang Technological University, Wealth Management Institute
Investment and Financial Management	Client Investment Suitability	4	Certified Financial Planner Programme (IBF Level 2)	Financial Planning Association of Singapore
			Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Chartered Financial Consultant/Singapore (IBF Level 2)	Singapore College of Insurance Limited
			ChFC04 - Investments	Singapore College of Insurance Limited
			ChFC05 - Plan Construction, Practice Standards and Ethics	Singapore College of Insurance Limited
			ChFC07 - Wealth Management and Financial Planning	Singapore College of Insurance Limited
			ChFC08 - Financial Planning Applications	Singapore College of Insurance Limited
AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business			
Investment and Financial Management	Credit Assessment	4	Commercial Loans to Business (IBF Level 2)	Omega Performance Corporation Asia Pacific
Risk Management, Governance and Regulatory Compliance	Credit Risk Management	3	Specialist Diploma in Consumer Banking - Business Assurance & CDD (M1, M2, M4)	Ngee Ann Polytechnic
			Private Banking Certification Level 1: Digital Skills	SMU Academy
			Private Banking Certification Level 2: Cross Banking	SMU Academy
			AWMP Programme III - Wealth Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Risk Management, Governance and Regulatory Compliance	Customer Acceptance Checking and Onboarding	3	NBS-WMI Wealth Management Programme-Affluent (WMA)	Nanyang Technological University, Nanyang Business School
			Priority Banking Certified Advisor-Level 1	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Wealth Management Programme - Affluent (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
			WMI Certificate in Trust Services (IBF Level 1)	Nanyang Technological University, Wealth Management Institute
Customer Relationship and Stakeholder Management	Customer Acquisition Management	4	Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			SMU Advanced Certificate: Client Acquisition & Management (IBF Level 2)	SMU Academy – Financial Services
Customer Relationship and Stakeholder	Customer Experience Management	4	Agency Management Training Course (AMTC)	Financial Services Managers Association (FSMA)
			AMTC - Bridging Course (IBF Level 3)	Financial Services Managers Association (FSMA)

Management			AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Customer Relationship Management	3	Certified Private Banker Level 2 - Digital Wealth Management	Nanyang Technological University, Wealth Management Institute
			DATA SCIENCE AND FINTECH I	Nanyang Technological University, Wealth Management Institute
			Specialist Diploma in Consumer Banking - Customer Interaction (M1 & M3)	Ngee Ann Polytechnic
			General Insurance Foundation Programme (IBF Level 1)	Singapore College of Insurance Limited
			ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1)	SMU Academy – Financial Services
			SMU Advanced Certificate: Client Acquisition & Management (IBF Level 2)	SMU Academy – Financial Services
			SMU Executive Certificate in Transaction Banking (IBF Level 1)	SMU Academy – Financial Services
Business Development and Strategy Management	Ethical Culture	4	CFA Singapore Level 2 Preparatory Programme (IBF Level 2/3)	CFA Society Singapore
			CFA Singapore Level 3 Preparatory Programme (IBF Level 2/3)	CFA Society Singapore
			CFA Singapore Portfolio Management Programme (IBF Level 2/3)	CFA Society Singapore
			CFA Singapore Research Programme (IBF Level 2/3)	CFA Society Singapore
			ICA Diploma in Anti-Money Laundering / Counter Financing Terrorism (AML/CFT): Module 2 - Regulatory Advisory (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Banking] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Capital Markets] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Insurance] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			Advanced Diploma in Private Banking - Ethics, Rules and Regulations	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Ethical Conduct	Nanyang Technological University, Wealth Management Institute
			Master of Science in Asset and Wealth Management - WM8001 Compliance, Ethics and Tools of Investment Mgt	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Wealth Management Programme - Affluent (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
			Ethical Private Banking Conduct	Salmon Thrust Pte Ltd
			Private Banking Certification Level 2: Ethical Conduct & Rules and Regulations	SMU Academy
Risk Management, Governance and Regulatory Compliance	Fraud Risk Management	4	Specialist Diploma in Consumer Banking - Business Assurance & CDD (M1, M2, M4)	Ngee Ann Polytechnic
Investment and Financial Management	Market Research and Analysis	4	Making Investments Work	CyberQuote Pte Ltd
			SGX CSP Module 1: Financial Markets, Regulations, Ethics & Risk Management	Singapore Exchange Limited
Product, Sales and Market Management	Market Specialisation	4	Certified Private Banker Level 1 - Market Specialisation (Elective)	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 1 - Market Specialisation (Elective)	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Market Specialisation (Elective)	Nanyang Technological University, Wealth Management Institute
			Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Navigating Market Turbulence	Salmon Thrust Pte Ltd
			Private Banking Certification Level 1: Marketing Specialization in the Chinese Market	SMU Academy
			Private Banking Certification Level 2: Market Specialization - Chinese Market	SMU Academy
			AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
AWMP Programme III - Wealth Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business			
Customer Relationship and Stakeholder Management	Networking	4	Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
Customer Relationship and Stakeholder Management	Personal Finance Advisory	4	Certified Private Banker Level 2 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Wealth Planning	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Wealth Management Programme - Affluent (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
			Investment Advisory: Design, Agreement and Monitoring of Investment Solutions (IBF Level 2)	Salmon Thrust Pte Ltd
			ChFC03 - Tax, Estate Planning and Legal Aspects of Financial Planning	Singapore College of Insurance Limited
			Private Banking Certification Level 1: Wealth Planning	SMU Academy

			SMU Certificate: Personal Estate Planning (IBF Level 2)	SMU Academy – Financial Services
			AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Product, Sales and Market Management	Product Advisory	4	SGX CSP Module 2: Client Acquisition & Execution Management	Singapore Exchange Limited
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			Private Banking Certification Level 1: Digital Skills	SMU Academy
			Private Banking Certification Level 2: Cross Banking	SMU Academy
Risk Management, Governance and Regulatory Compliance	Regulatory Compliance	4	Certified Anti-Money Laundering Specialist (CAMS)	ACAMS Chapter (Singapore)
			Certified Anti-Money Laundering Specialist (CAMS) - 6th Edition - Singapore (CAMS6-SG (IBF Level 2))	ACAMS Chapter (Singapore)
			ICA Diploma in Anti-Money Laundering / Counter Financing Terrorism (AML/CFT): Module 3 - Compliance Risk Management (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Banking] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Capital Markets] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Insurance] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 3 - Compliance Risk Management [Banking] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 3 - Compliance Risk Management [Capital Markets] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 3 - Compliance Risk Management [Insurance] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 4 - Compliance Monitoring [Banking] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 4 - Compliance Monitoring [Capital Markets] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 4 - Compliance Monitoring [Insurance] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			Executive Certificate in Compliance (Insurance)	Singapore College of Insurance Limited
Customer Relationship and Stakeholder Management	Stakeholder Management	4	Certified Anti-Money Laundering Specialist (CAMS) - 6th Edition - Singapore (CAMS6-SG (IBF Level 2))	ACAMS Chapter (Singapore)
			ICA Diploma in Anti-Money Laundering / Counter Financing Terrorism (AML/CFT): Module 2 - Regulatory Advisory (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Banking] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Capital Markets] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Insurance] (IBF Level 2)	International Compliance Training Academy Pte. Ltd.
			Executive Certificate in Compliance (Insurance)	Singapore College of Insurance Limited
			AWMP Programme III - Wealth Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business

Please click [here](#) to view the Generic Skills and Competencies (GSCs) programme listing.

Please visit <https://www.ibf.org.sg> for the latest list of IBF programmes aligned to the Skills Framework for Financial Services.