

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 Management Director - Private Banking/Team Leader

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	5	Agency Management Training Course (AMTC) AMTC - Bridging Course (IBF Level 3) Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 2	Financial Services Managers Association (FSMA) Financial Services Managers Association (FSMA) Nanyang Technological University, Wealth Management Institute
Investment and Financial Management	Business Environment Analysis	5	CAIA level 1 ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1)	CAIA Association Singapore Office Limited SMU Academy – Financial Services
Business Development and Strategy Management	Business Negotiation	5	Certified Private Banker Level 2 - Client Relationship Management AWMP Programme II - Investment Advisory (IBF Level 1) AWMP Programme II - Investment Advisory (IBF Level 2)	Nanyang Technological University, Wealth Management Institute SMU Lee Kong Chian School of Business SMU Lee Kong Chian School of Business
Business Development and Strategy Management	Business Opportunities Development	5	Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
Business Development and Strategy Management	Business Performance Management	6	Certificate in Commercial Banking for Technology and Operations SMU Certificate in IT Design, Development & Testing (IBF Level 1) ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	Ngee Ann Polytechnic SMU Academy SMU Academy – Financial Services
Business Development and Strategy Management	Business Planning	6	ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	SMU Academy – Financial Services
Risk Management, Governance and Regulatory Compliance	Business Risk Assessment	6	IBF Standards Operational Risk Management Level 1	National University of Singapore - Risk Management Institute
Business Development and Strategy Management	Change Management	3	Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 1	Nanyang Technological University, Wealth Management Institute
Risk Management, Governance and Regulatory Compliance	Customer Acceptance Checking and Onboarding	5	NBS-WMI Wealth Management Programme-Affluent (WMA) Priority Banking Certified Advisor-Level 1 WMI Advanced Wealth Management Programme - Affluent (IBF Level 2/3) WMI Certificate in Trust Services (IBF Level 1)	Nanyang Technological University, Nanyang Business School Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute
Investment and Financial Management	Client Investment Suitability	5	Associate Financial Planner Programme (IBF Level 1) Certified Private Banker Level 1 - Investment Advisory Certified Private Banker Level 1 - Investment Advisory Certificate in Financial Needs Analysis and Plan Construction SGX CSP Module 2: Client Acquisition & Execution Management Private Banking Certification Level 1: Client Relationship Management AWMP Programme II - Investment Advisory (IBF Level 1)	Financial Planning Association of Singapore Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Singapore College of Insurance Limited Singapore Exchange Limited SMU Academy SMU Lee Kong Chian School of Business
Investment and Financial Management	Credit Assessment	5	Commercial Loans to Business (IBF Level 2)	Omega Performance Corporation Asia Pacific
Customer Relationship and Stakeholder Management	Customer Acquisition Management	5	AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
			Head Start with Holistic Financial Planning (IBF Level 1) Associate Financial Planner Programme (IBF Level 1) Client On-Boarding and Advisory Workshop (IBF Level 1)	Financial Perspectives Pte Ltd Financial Planning Association of Singapore Financial Planning Association of Singapore

Customer Relationship and Stakeholder Management	Customer Experience Management	5	Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Wealth Management Programme - Affluent (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
			Specialist Diploma in Consumer Banking - Customer Interaction (M1 & M3)	Ngee Ann Polytechnic
			Certificate in Financial Needs Analysis and Plan Construction	Singapore College of Insurance Limited
			General Insurance Foundation Programme (IBF Level 1)	Singapore College of Insurance Limited
			Life Insurance Foundation Programme (IBF Level 1)	Singapore College of Insurance Limited
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
Customer Relationship and Stakeholder Management	Customer Relationship Management	5	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
Data Analytics and Information Technology Management	Cybersecurity	3	Certified Private Banker Level 1 - 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 - Business Assurance & CDD (M1, M2, M4)	Ngee Ann Polytechnic
			AWMP Programme II - Investment Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
Business Development and Strategy Management	Ethical Culture	5	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
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	5	Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy

People Management	People Performance Management	5	Agency Management Training Course (AMTC) AMTC - Bridging Course (IBF Level 3)	Financial Services Managers Association (FSMA) Financial Services Managers Association (FSMA)
Customer Relationship and Stakeholder Management	Personal Finance Advisory	5	Business Succession Planning Workshop (IBF Level 2) Certified Financial Planner Programme (IBF Level 2) Chartered Financial Consultant/Singapore (IBF Level 2) ChFC01 - Financial Planning: Process and Environment ChFC02 - Risk Management, Insurance and Retirement Planning ChFC04 - Investments ChFC05 - Plan Construction, Practice Standards and Ethics ChFC06 - Planning for Business Owners and Professionals ChFC07 - Wealth Management and Financial Planning ChFC08 - Financial Planning Applications ChFC09 - Ethics For The Financial Services Professional	Financial Planning Association of Singapore Financial Planning Association of Singapore Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited
Risk Management, Governance and Regulatory Compliance	Portfolio and Investment Risk Management	4	CAIA level II (revised) CFA Singapore Level 2 Preparatory Programme (IBF Level 2/3) CFA Singapore Level 3 Preparatory Programme (IBF Level 2/3) CFA Singapore Portfolio Management Programme (IBF Level 2/3) CFA Singapore Research Programme (IBF Level 2/3)	CAIA Association Singapore Office Limited CFA Society Singapore CFA Society Singapore CFA Society Singapore CFA Society Singapore
Product, Sales and Market Management	Product Advisory	4	SGX CSP Module 2: Client Acquisition & Execution Management Private Banking Certification Level 1: Client Relationship Management Private Banking Certification Level 1: Digital Skills Private Banking Certification Level 2: Cross Banking	Singapore Exchange Limited SMU Academy SMU Academy SMU Academy
Risk Management, Governance and Regulatory Compliance	Risk Management	4	Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 2	Nanyang Technological University, Wealth Management Institute
Customer Relationship and Stakeholder Management	Stakeholder Management	5	Certified Private Banker Level 1 - Market Specialisation (Elective) Private Banking Certification Level 1: Client Relationship Management Private Banking Certification Level 1: Marketing Specialization in the Chinese Market	Nanyang Technological University, Wealth Management Institute SMU Academy SMU Academy
Investment and Financial Management	Wealth Planning Administration	3	Certified Private Banker Level 1 - Investment Advisory Certified Private Banker Level 1 - Investment Advisory Certified Private Banker Level 2 - Client Relationship Management Certified Private Banker Level 2 - Investment Advisory WMI Certificate in Trust Services (IBF Level 1) AWMP Programme II - Investment Advisory (IBF Level 1)	Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute 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.