

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 - Private Banking

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
Business Development and Strategy Management	Business Planning	3	ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	SMU Academy – Financial Services
Risk Management, Governance and Regulatory Compliance	Customer Acceptance Checking and Onboarding	4	Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 1 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Certificate in Trust Services (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
			SGX CSP Module 2: Client Acquisition & Execution Management	Singapore Exchange Limited
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			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			
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
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 Management	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)
			AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
			Certified Private Banker Level 2 - Digital Wealth Management	Nanyang Technological University, Wealth Management Institute

Customer Relationship and Stakeholder Management	Customer Relationship Management	4	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	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
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

Risk Management, Governance and Regulatory Compliance	Portfolio and Investment Risk Management	4	CAIA level II (revised)	CAIA Association Singapore Office Limited
			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
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	Risk Management	3	ICA Advanced Certificate in Governance, Risk & Compliance (IBF Level 1)	International Compliance Training Academy Pte. Ltd.
			WMI Certificate in Trust Services (IBF Level 1)	Nanyang Technological University, Wealth Management Institute
			Certificate in Commercial Banking for Technology and Operations	Ngee Ann Polytechnic
			SGX CSP Module 1: Financial Markets, Regulations, Ethics & Risk Management	Singapore Exchange Limited
			SMU Certificate in Enterprise Essentials (IBF Level 1)	SMU Academy
			ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	SMU Academy – Financial Services
			ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1)	SMU Academy – Financial Services
			AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
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
Investment and Financial Management	Wealth Planning Administration	3	Certified Private Banker Level 1 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 1 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			WMI Certificate in Trust Services (IBF Level 1)	Nanyang Technological University, Wealth Management Institute
			AWMP Programme II - Investment Advisory (IBF Level 1)	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.