

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 - Small and Medium Enterprises

| Full Qualification Programmes | Providers |
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| Technical Skills and Competencies (TSC) | | | Modular Programmes | Providers |
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| Category | Title | Proficiency Level | | |
| Customer Relationship and Stakeholder Management | Account Management | 3 | NBS-WMI Wealth Management Programme-Affluent (WMA) | Nanyang Technological University, Nanyang Business School |
| | | | Certified Private Banker Level 1 - Client Relationship Management | Nanyang Technological University, Wealth Management Institute |
| | | | 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 |
| | | | Certificate in Commercial Banking for Technology and Operations | Ngee Ann Polytechnic |
| | | | SGX CSP Module 2: Client Acquisition & Execution Management | Singapore Exchange Limited |
| | | | Private Banking Certification Level 1: Client Relationship Management | 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 1) | SMU Lee Kong Chian School of Business |
| Investment and Financial Management | Business Environment Analysis | 3 | CAIA level 1 | CAIA Association Singapore Office Limited |
| | | | ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1) | SMU Academy – Financial Services |
| Business Development and Strategy Management | Business Negotiation | 5 | 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 |
| Investment and Financial Management | Credit Assessment | 3 | Commercial Loans to Business (IBF Level 2) | Omega Performance Corporation Asia Pacific |
| 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 Management | Customer Experience Management | 3 | Head Start with Holistic Financial Planning (IBF Level 1) | Financial Perspectives Pte Ltd |
| | | | Associate Financial Planner Programme (IBF Level 1) | Financial Planning Association of Singapore |
| | | | Client On-Boarding and Advisory Workshop (IBF Level 1) | Financial Planning Association of Singapore |
| | | | 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 |

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| | | | Private Banking Certification Level 1: Client Relationship Management | SMU Academy |
| 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 | Product Advisory | 3 | CFA Program - Fund Management (IBF Level 1) by AB Maximus | A.B. Maximus & Co., Pte Ltd |
| | | | CFA Program - Fund Management Plus (IBF Level 1) by AB Maximus | A.B. Maximus & Co., Pte Ltd |
| | | | CAIA level 1 | CAIA Association Singapore Office Limited |
| | | | Certified Private Banker Level 2 Cross Banking (Elective) | Nanyang Technological University, Wealth Management Institute |
| | | | Specialist Diploma in Consumer Banking - Product Development (M3 & M4) | Ngee Ann Polytechnic |
| | | | ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1) | SMU Academy – Financial Services |
| | | | SMU Executive Certificate in Transaction Banking (IBF Level 1) | SMU Academy – Financial Services |
| | | | AWMP Programme III - Wealth Advisory (IBF Level 2) | SMU Lee Kong Chian School of Business |
| 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 |
| | | | 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 | | | |

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| Risk Management, Governance and Regulatory Compliance | Risk Management | 3 | 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 |

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.