

## 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 - Commercial**

Full Qualification Programmes	Providers
-	-

Technical Skills and Competencies (TSC)			Modular Programmes	Providers
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	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	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	Client Investment Suitability	3	Head Start with Holistic Financial Planning (IBF Level 1)	Financial Perspectives Pte Ltd
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	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
			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

Business Development and Strategy Management	Ethical Culture	4	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
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			
Risk Management, Governance and Regulatory Compliance	Risk Management	3		
			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	5	Certified Private Banker Level 1 - Market Specialisation (Elective)	Nanyang Technological University, Wealth Management Institute
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			Private Banking Certification Level 1: Marketing Specialization in the Chinese Market	SMU Academy

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.