

## 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 - Financial Institutions and Non-Bank Financial Institutions

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	6	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	6	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	6	Certified Private Banker Level 2 - Client Relationship Management	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	4	Commercial Loans to Business (IBF Level 2)	Omega Performance Corporation Asia Pacific
Risk Management, Governance and Regulatory Compliance	Customer Acceptance Checking and Onboarding	4	Certified Private Banker Level 1 - Client Relationship Management Certified Private Banker Level 1 - Investment Advisory WMI Advanced Certificate in Trust Services (IBF Level 2/3) SGX CSP Module 2: Client Acquisition & Execution Management Private Banking Certification Level 1: Client Relationship Management ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1) SMU Advanced Certificate: Client Acquisition & Management (IBF Level 2)	Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Singapore Exchange Limited SMU Academy SMU Academy – Financial Services SMU Academy – Financial Services
Customer Relationship and Stakeholder Management	Customer Acquisition Management	5	AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Customer Experience Management	5	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) Certified Private Banker Level 1 - Client Relationship Management WMI Advanced Wealth Management Programme - Affluent (IBF Level 2/3) Specialist Diploma in Consumer Banking - Customer Interaction (M1 & M3) Certificate in Financial Needs Analysis and Plan Construction General Insurance Foundation Programme (IBF Level 1) Life Insurance Foundation Programme (IBF Level 1)	Financial Perspectives Pte Ltd Financial Planning Association of Singapore Financial Planning Association of Singapore Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Ngee Ann Polytechnic Singapore College of Insurance Limited Singapore College of Insurance Limited Singapore College of Insurance Limited

			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
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
			People Management	People Performance Management
			AMTC - Bridging Course (IBF Level 3)	Financial Services Managers Association (FSMA)
Product, Sales and Market Management	Product Advisory	5	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	5	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
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	6	Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 2	Nanyang Technological University, Wealth Management Institute
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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.