

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: **Sales and Distribution Specialist/Coverage Officer**

| 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 | Channel Management | 4 | Specialist Diploma in Consumer Banking - Product Development (M3 & M4) | Ngee Ann Polytechnic |
| 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 Relationship Management | 4 | 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 |
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| 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 |
| 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 |
| Business Development and Strategy Management | Proposal Management | 4 | Investment Systems, Operations and Marketing | Nanyang Technological University, Wealth Management Institute |
| Product Sales and | | | CFA Program - Fund Management (IBF Level 1) by AB Maximus | A.B. Maximus & Co., Pte Ltd |

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| Product, Sales and Market Management | Sales Strategy | 4 | CFA Program - Fund Management Plus (IBF Level 1) by AB Maximus CAIA level 1 | A.B. Maximus & Co., Pte Ltd CAIA Association Singapore Office Limited |
| Customer Relationship and Stakeholder Management | Stakeholder Management | 4 | Certified Anti-Money Laundering Specialist (CAMS) - 6th Edition - Singapore (CAMS6-SG (IBF Level 2)) ICA Diploma in Anti-Money Laundering / Counter Financing Terrorism (AML/CFT): Module 2 - Regulatory Advisory (IBF Level 2) ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Banking] (IBF Level 2) ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Capital Markets] (IBF Level 2) ICA Diploma in Governance, Risk and Compliance: Module 2 - Regulatory Advisory [Insurance] (IBF Level 2) Executive Certificate in Compliance (Insurance) AWMP Programme III - Wealth Advisory (IBF Level 2) | ACAMS Chapter (Singapore) International Compliance Training Academy Pte. Ltd. International Compliance Training Academy Pte. Ltd. International Compliance Training Academy Pte. Ltd. International Compliance Training Academy Pte. Ltd. Singapore College of Insurance Limited SMU Lee Kong Chian School of Business |
| 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 | Customer Acceptance Checking and Onboarding | 3 | 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 |

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.