

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:**
Investment Counsellor Team Lead

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	5	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 Opportunities Development	5	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
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 Relationship Management	5	Certified Private Banker Level 2 - Digital Wealth Management DATA SCIENCE AND FINTECH I Specialist Diploma in Consumer Banking - Customer Interaction (M1 & M3) General Insurance Foundation Programme (IBF Level 1) ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1) SMU Advanced Certificate: Client Acquisition & Management (IBF Level 2) SMU Executive Certificate in Transaction Banking (IBF Level 1)	Nanyang Technological University, Wealth Management Institute Nanyang Technological University, Wealth Management Institute Ngee Ann Polytechnic Singapore College of Insurance Limited SMU Academy – Financial Services SMU Academy – Financial Services SMU Academy – Financial Services
Business Development and Strategy Management	Ethical Culture	5	CFA Singapore Level 2 Preparatory Programme (IBF Level 2/3) CFA Singapore Level 3 Preparatory Programme (IBF Level 2/3) CFA Singapore Portfolio Management Programme (IBF Level 2/3) CFA Singapore Research Programme (IBF Level 2/3) 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) Advanced Diploma in Private Banking - Ethics, Rules and Regulations Certified Private Banker Level 2 - Ethical Conduct	CFA Society Singapore CFA Society Singapore CFA Society Singapore CFA Society 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. Nanyang Technological University, Wealth Management Institute 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
Investment and Financial Management	Market Research and Analysis	5	Making Investments Work	CyberQuote Pte Ltd
			SGX CSP Module 1: Financial Markets, Regulations, Ethics & Risk Management	Singapore Exchange Limited
People Management	People Performance Management	5	Agency Management Training Course (AMTC)	Financial Services Managers Association (FSMA)
			AMTC - Bridging Course (IBF Level 3)	Financial Services Managers Association (FSMA)
Customer Relationship and Stakeholder Management	Personal Finance Advisory	5	Business Succession Planning Workshop (IBF Level 2)	Financial Planning Association of Singapore
			Certified Financial Planner Programme (IBF Level 2)	Financial Planning Association of Singapore
			Chartered Financial Consultant/Singapore (IBF Level 2)	Singapore College of Insurance Limited
			ChFC01 - Financial Planning: Process and Environment	Singapore College of Insurance Limited
			ChFC02 - Risk Management, Insurance and Retirement Planning	Singapore College of Insurance Limited
			ChFC04 - Investments	Singapore College of Insurance Limited
			ChFC05 - Plan Construction, Practice Standards and Ethics	Singapore College of Insurance Limited
			ChFC06 - Planning for Business Owners and Professionals	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
ChFC09 - Ethics For The Financial Services Professional	Singapore College of Insurance Limited			
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
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.