

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:
Head of Product Origination and Structuring

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	Behavioural Finance	5	Certified Private Banker Level 2 - Investment Advisory AWMP Programme II - Investment Advisory (IBF Level 2)	Nanyang Technological University, Wealth Management Institute SMU Lee Kong Chian School of Business
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
Investment and Financial Management	Capital Management	6	ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1)	SMU Academy – Financial Services
Investment and Financial Management	Client Investment Suitability	5	Associate Financial Planner Programme (IBF Level 1)	Financial Planning Association of Singapore
			Certified Private Banker Level 1 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 1 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Certificate in Financial Needs Analysis and Plan Construction	Singapore College of Insurance Limited
			SGX CSP Module 2: Client Acquisition & Execution Management	Singapore Exchange Limited
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			AWMP Programme II - Investment Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
Risk Management, Governance and Regulatory Compliance	Customer Acceptance Checking and Onboarding	4	Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 1 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Certificate in Trust Services (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
			SGX CSP Module 2: Client Acquisition & Execution Management	Singapore Exchange Limited
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			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
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)	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
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			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

Customer Relationship and Stakeholder Management	Customer Relationship Management	5	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
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
Investment and Financial Management	Financial Statements Review	6	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 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
ChFC06 - Planning for Business Owners and Professionals	Singapore College of Insurance Limited			
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)
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			
Product, Sales and Market Management	Product Performance Management	5	Specialist Diploma in Consumer Banking - Product Development (M3 & M4)	Ngee Ann Polytechnic
			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.

Risk Management, Governance and Regulatory Compliance	Regulatory Compliance	5	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	5	Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 2	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.