

## 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: Product Origination and Structuring Manager**

Full Qualification Programmes	Providers
-	-

Technical Skills and Competencies (TSC)			Modular Programmes	Providers
Category	Title	Proficiency Level		
Customer Relationship and Stakeholder Management	Account Management	4	Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			WMI Advanced Certificate in Trust Services (IBF Level 2/3)	Nanyang Technological University, Wealth Management Institute
Investment and Financial Management	Behavioural Finance	4	Certified Private Banker Level 2 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			AWMP Programme II - Investment Advisory ( IBF Level 2)	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
Investment and Financial Management	Capital Management	5	ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1)	SMU Academy – Financial Services
Investment and Financial Management	Client Investment Suitability	4	Certified Financial Planner Programme (IBF Level 2)	Financial Planning Association of Singapore
			Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Chartered Financial Consultant/Singapore (IBF Level 2)	Singapore College of Insurance Limited
			ChFC04 - Investments	Singapore College of Insurance Limited
			ChFC05 - Plan Construction, Practice Standards and Ethics	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
			AWMP Programme II - Investment Advisory ( IBF Level 2)	SMU Lee Kong Chian School of Business
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 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
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
			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.

Business Development and Strategy Management	Ethical Culture	4	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 Analysis	4	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
			CFA Singapore Fund Management Programme (IBF Level 1)	CFA Society Singapore
			CFA Singapore Level 1 Preparatory Programme (IBF Level 1)	CFA Society Singapore
			Making Investments Work	CyberQuote Pte Ltd
			Master of Science in Asset and Wealth Management - FINANCIAL STATEMENT ANALYSIS	Nanyang Technological University, Wealth Management Institute
			SGX CSP Module 3: Fundamental Analysis	Singapore Exchange Limited
Investment and Financial Management	Financial Modelling	4	CAIA Level II - Reseach	CAIA Association Singapore Office Limited
			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
			Equity and Fixed Income Analysis	Nanyang Technological University, Wealth Management Institute
Investment and Financial Management	Financial Statements Review	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
			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	4	Making Investments Work	CyberQuote Pte Ltd
			SGX CSP Module 1: Financial Markets, Regulations, Ethics & Risk Management	Singapore Exchange Limited
People Management	People Performance Management	4	Certificate in Commercial Banking for Technology and Operations	Ngee Ann Polytechnic
			ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	SMU Academy – Financial Services
Product, Sales and Market Management	Product Advisory	4	SGX CSP Module 2: Client Acquisition & Execution Management	Singapore Exchange Limited
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			Private Banking Certification Level 1: Digital Skills	SMU Academy
			Private Banking Certification Level 2: Cross Banking	SMU Academy
Product, Sales and Market Management	Product Performance Management	4	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.
			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.

Risk Management, Governance and Regulatory Compliance	Regulatory Compliance	4	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

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.