

## 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 Client Management/Head of Account Management**

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
Business Development and Strategy Management	Business Opportunities Development	5	Certified Private Banker Level 2 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
Business Development and Strategy Management	Business Performance Management	5	Certificate in Commercial Banking for Technology and Operations SMU Certificate in IT Design, Development & Testing (IBF Level 1) ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	Ngee Ann Polytechnic SMU Academy SMU Academy – Financial Services
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) Private Banking Certification Level 1: Client Relationship Management	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 SMU Academy
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	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

			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	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			
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.