

## 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:**  
**Client Executive/Account Management Executive**

Full Qualification Programmes	Providers
Specialist Diploma in Fund Management and Administration	Nanyang Polytechnic
Specialist Diploma in Financial Advisory Services	Temasek Polytechnic

Technical Skills and Competencies (TSC)			Modular Programmes	Providers
Category	Title	Proficiency Level		
Customer Relationship and Stakeholder Management	Account Management	3	NBS-WMI Wealth Management Programme-Affluent (WMA)	Nanyang Technological University, Nanyang Business School
			Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			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
			Certificate in Commercial Banking for Technology and Operations	Ngee Ann Polytechnic
			SGX CSP Module 2: Client Acquisition & Execution Management	Singapore Exchange Limited
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
			ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	SMU Academy – Financial Services
			ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1)	SMU Academy – Financial Services
			AWMP Programme II - Investment Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
Business Development and Strategy Management	Business Opportunities Development	3	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
			DATA SCIENCE AND FINTECH I	Nanyang Technological University, Wealth Management Institute
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
Business Development and Strategy Management	Continuous Improvement Management	3	Certificate in Commercial Banking for Technology and Operations	Ngee Ann Polytechnic
			Specialist Diploma in Consumer Banking - Business Assurance & CDD (M1, M2, M4)	Ngee Ann Polytechnic
			ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	SMU Academy – Financial Services
Customer Relationship and Stakeholder Management	Customer Experience Management	3	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
Customer Relationship and Stakeholder Management	Customer Relationship management	3	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
Business Development and Strategy Management	Ethical Culture	3	CFA Singapore Fund Management Programme (IBF Level 1)	CFA Society Singapore
			CFA Singapore Level 1 Preparatory Programme (IBF Level 1)	CFA Society Singapore
			ICA Advanced Certificate in Governance, Risk & Compliance (IBF Level 1)	International Compliance Training Academy Pte. Ltd.
			Certified Private Banker Level 1 - Ethical Conduct	Nanyang Technological University, Wealth Management Institute
			IBF Standards Operational Risk Management Level 1	National University of Singapore - Risk Management Institute
			SGX CSP Module 1: Financial Markets, Regulations, Ethics & Risk Management	Singapore Exchange Limited
			AWMP Programme III - Wealth Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Market Profiling	3	Specialist Diploma in Consumer Banking- Marketing Digital Engagement (M3 & M4)	Ngee Ann Polytechnic
			AWMP Programme III - Wealth Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
Product, Sales and Market Management	Product Advisory	3	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	Service Challenges	3	Certified Private Banker Level 1 - Client Relationship Management	Nanyang Technological University, Wealth Management Institute
			Private Banking Certification Level 1: Client Relationship Management	SMU Academy
Customer Relationship and Stakeholder Management	Stakeholder Management	3	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.