

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 Claims Liaison

| Full Qualification Programmes | Providers |
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| - | - |

| Technical Skills and Competencies (TSC) | | | Modular Programmes | Providers |
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| Category | Title | Proficiency Level | | |
| 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 |
| 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 |
| Risk Management, Governance and Regulatory Compliance | Fraud Risk Management | 5 | Specialist Diploma in Consumer Banking - Business Assurance & CDD (M1, M2, M4) | Ngee Ann Polytechnic |
| 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 |

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| | | | 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. |
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| 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.