

Skills Framework for Financial Services

Programmes that broaden or deepen specific skills and knowledge
for the various job roles in the sector

Product Solutioning and Management

Job Role:
Head of Wealth Planning/Director of Wealth Planning

Full Qualification Programmes	Providers
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Technical Skills and Competencies (TSC)			Modular Programmes	Providers
Category	Title	Proficiency Level		
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
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
Business Development and Strategy Management	Business Planning	6	ACI-SMU Executive Certificate in Financial Markets Operations (IBF Level 1)	SMU Academy – Financial Services
Business Development and Strategy Management	Change Management	5	Certified Private Banker Level 3 (Team Leader) - Essential Management and Leadership Skills Part 1	Nanyang Technological University, Wealth Management Institute
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			
Product, Sales and Market Management	Market Specialisation	4	Certified Private Banker Level 1 - Market Specialisation (Elective)	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 1 - Market Specialisation (Elective)	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Certified Private Banker Level 2 - Market Specialisation (Elective)	Nanyang Technological University, Wealth Management Institute
			Investment Advisory	Nanyang Technological University, Wealth Management Institute
			Navigating Market Turbulence	Salmon Thrust Pte Ltd
			Private Banking Certification Level 1: Marketing Specialization in the Chinese Market	SMU Academy
			Private Banking Certification Level 2: Market Specialization Chinese Market	SMU Academy

			AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
			AWMP Programme III - Wealth Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Networking	5	Certified Private Banker Level 1 - Client Relationship Management Private Banking Certification Level 1: Client Relationship Management	Nanyang Technological University, Wealth Management Institute SMU Academy
People Management	People Performance Management	5	Agency Management Training Course (AMTC) AMTC - Bridging Course (IBF Level 3)	Financial Services Managers Association (FSMA) Financial Services Managers Association (FSMA)
Product, Sales and Market Management	Product Advisory	5	CFA Program - Fund Management (IBF Level 1) by AB Maximus CFA Program - Fund Management Plus (IBF Level 1) by AB Maximus CAIA level 1 Certified Private Banker Level 2 Cross Banking (Elective) Specialist Diploma in Consumer Banking - Product Development (M3 & M4) ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1) SMU Executive Certificate in Transaction Banking (IBF Level 1) AWMP Programme III - Wealth Advisory (IBF Level 2)	A.B. Maximus & Co., Pte Ltd A.B. Maximus & Co., Pte Ltd CAIA Association Singapore Office Limited Nanyang Technological University, Wealth Management Institute Ngee Ann Polytechnic SMU Academy – Financial Services SMU Academy – Financial Services SMU Lee Kong Chian School of Business
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
Customer Relationship and Stakeholder Management	Stakeholder Management	5	Certified Private Banker Level 1 - Market Specialisation (Elective) Private Banking Certification Level 1: Client Relationship Management Private Banking Certification Level 1: Marketing Specialization in the Chinese Market	Nanyang Technological University, Wealth Management Institute SMU Academy SMU Academy
Investment and Financial Management	Wealth Planning Administration	5	WMI Advanced Certificate in Trust Services (IBF Level 2/3)	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.