

## 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:**  
**Client Portfolio Analyst**

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
Investment and Financial Management	Business Environment Analysis	3	CAIA Level 1	CAIA Association Singapore Office Limited
			ACI-SMU Financial Markets Certificate - Module 2: Trading & Treasury Sales (IBF Level 1)	SMU Academy – Financial Services
Investment and Financial Management	Client Investment Suitability	3	Head Start with Holistic Financial Planning (IBF Level 1)	Financial Perspectives Pte Ltd
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	Market Specialisation	3	AWMP Programme III - Wealth Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Networking	3	AWMP Programme II - Investment Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business

Business Development and Strategy Management	Proposal Management	3	Investment Systems, Operations and Marketing	Nanyang Technological University, Wealth Management Institute
Risk Management, Governance and Regulatory Compliance	Regulatory Compliance	3	ICA Advanced Certificate in Governance, Risk & Compliance (IBF Level 1)	International Compliance Training Academy Pte. Ltd.
			Specialist Diploma in Consumer Banking - Business Assurance & CDD (M1, M2, M4)	Ngee Ann Polytechnic
			SMU PROFESSIONAL CERTIFICATE IN GOVERNANCE, IT RISK MANAGEMENT AND COMPLIANCE (IBF LEVEL 2)	SMU Academy
Customer Relationship and Stakeholder Management	Stakeholder Management	4	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 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.
			Executive Certificate in Compliance (Insurance)	Singapore College of Insurance Limited
			AWMP Programme III - Wealth Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business

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.