

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 Segments

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
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
Risk Management, Governance and Regulatory Compliance	Business Risk Assessment	4	IBF Standards Operational Risk Management Level 1	National University of Singapore - Risk Management Institute
Customer Relationship and Stakeholder Management	Customer Acquisition Management	5	AWMP Programme II - Investment Advisory (IBF Level 2)	SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Customer Behaviour Analysis	5	AWMP Programme II - Investment Advisory (IBF Level 1)	SMU Lee Kong Chian School of Business
Customer Relationship and Stakeholder Management	Customer Relationship Management	5	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			
Product, Sales and Market Management	Digital Marketing	5	Fast Track Digital Marketing	ClickAcademy Asia Pte Ltd
			Digital Marketing & Growth Hacking	Hyper Island Institute of Higher Education Pte Ltd
			Engaging Customers Effectively in the Digital Era	PricewaterhouseCoopers Risk Services Pte Ltd
			Storytelling for Business Leaders: Future Communication Skills Online & Offline	Singapore Media Academy Private Limited
			Squared Online Certificate in Digital Marketing	Avado Asia Pacific Pte Ltd
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
Investment and Financial Management	Market Research and Analysis	5	Making Investments Work	CyberQuote Pte Ltd
			SGX CSP Module 1: Financial Markets, Regulations, Ethics & Risk Management	Singapore Exchange Limited
Customer Relationship and Stakeholder Management	Partnership Management	5	Specialist Diploma in Consumer Banking - Product Development (M3 & 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
			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
Product, Sales and Market Management	Sales Strategy	4	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

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.