



WMI Advanced Wealth Management Programme Application Form

General Instructions For Completing Your Application

Thank you for your interest in the WMI Advanced Wealth Management Programme (AWMP). Please read the following instructions carefully before completing the application form. Supplementary instructions are given in each section of the form. Please complete the sections accordingly and provide the supporting documents as required. You may wish to retain a copy of the completed form for personal record. All registration details will be kept in strict confidence. *You are encouraged to apply early.*

Application Fee

The application fee is S\$85.00. Applications received without application fees will not be processed. Payment should be made by cheque in favour of "Wealth Management Institute Pte Ltd". The application fee is *non-refundable*.

Tuition Fee

Participants may enrol for the entire programme or by module. Upon acceptance into the Programme, applicants will need to pay the full applicable tuition fee. For company-sponsored applicants, the payment of the tuition fee should be made by cheque in favour of "Wealth Management Institute Pte Ltd". For individual applicants, the payment of the tuition fee should be made by cashier's order. The tuition fee is subject to applicable GST and is *non-refundable*.

Module	Fee
Modules I & II	S\$8,000
Module III	S\$6,000
Module IV	S\$6,000
Module V	S\$6,000
Module VI	S\$6,000

Note: The above fees are indicative and subject to change

Application

Please send your completed application form, the supporting documents and cheque payment for the application fee by mail to:

Wealth Management Institute Pte Ltd
60B Orchard Road
#06-18, Tower 2
The Atrium@Orchard
Singapore 238891

For more information, please reach us at (65) 6828 6988 or exec.devt@wmi.com.sg.



CHECKLIST

Application Form and Supporting Documents

Before sending your application to the Wealth Management Institute, please check (✓) the following items (where applicable) to ensure they have been included in your application:

- Check Payment for Application fee (S\$85.00)
- Application form (including this checklist, duly completed)
- Photocopy of:
 - a) NRIC (for Singaporean), or
 - b) Passport, re-entry permit, and/or employment pass (for Singapore permanent residents and/or Singapore-based foreigners)

For individual applicants, please include the following documents as well:

- Official academic transcripts of all educational institutions attended
- Current resume
- Any other supporting documents

1. PERSONAL INFORMATION OF CANDIDATE

Please read the instructions carefully and print clearly in **BLOCK LETTERS**.

Name (as in NRIC or Passport) (Dr /Mr / Mrs / Ms)*		
Telephone Nos. Home:	Office:	Mobile Phone:
Mailing Address	Email Address	
Date of Birth (dd/mm/yyyy):	Age	
Gender: M / F*	Dietary Preference (if any)	
Nationality	Country of Birth	
For Singapore Citizen NRIC No.:	For Singapore PR UIN No.:	
For Singapore-based Foreigners Do you currently possess a valid work pass? Yes / No* Please provide your Foreign Identification No.:		

**Please delete accordingly.*

2. CURRENT EMPLOYER

Name of Company
Company Address
Department at which you are working (E.g. Private Banking, Commercial Banking, IT, etc.)
Designation
Nature of Work (E.g. Relationship Manager in Private Banking, Investment Advisor, etc.)

3. EMPLOYMENT HISTORY

Total number of years of working experience years

Total number of years of work experience in private banking: years

Please indicate previous full-time work experiences in *reverse* chronological order. Full-time national services and part-time, temporary and vacation jobs need *not* be included.

From (mm/yy)	To (mm/yy)	Organisation	Designation	Nature of Work e.g. relationship manager in private banking

4. HIGH SCHOOL / POLYTECHNIC / COLLEGE / UNIVERSITY EDUCATION

Please list in *reverse* chronological order.

From (mm/yy)	To (mm/yy)	Name of Institution, Country	Highest qualification achieved, Major (if any)

5. OTHER QUALIFICATIONS

Please also include professional course(s) you are currently undertaking or being admitted to (e.g. CFA, ACCA, etc.), if applicable.

From (mm/yy)	To (mm/yy)	Professional Body	Discipline	Status

6. PROGRAMME REGISTRATION

Please check (✓) in the boxes below the module(s) for which you are applying.

Participants who would like to attain the WMI AWMP Certificate: Relationship Management – High Net Worth (Job Role V) would need to successfully complete **Modules I, II, IV, V and VI**.

Participants who would like to attain the WMI AWMP Certificate: Investment Advisory Services (Job Role V) would need to successfully complete **Modules I, II, III and V**.

Participants who would like to attain the WMI AWMP Certificate: Relationship Management – High Net Worth (Job Role V) and Investment Advisory Services (Job Role V) would need to successfully complete **all the 6 modules**.

Participants who have the relevant working experience (related to RM–HNW, Job Role VI)⁺ and who would like to attain the WMI AWMP Certificate: Relationship Management – High Net Worth (Job Role VI) would need to successfully complete **Modules I, II, IV, V and VI** and pass the assessment for Competency Unit 5⁺⁺ at the Job Role VI level. A separate assessment fee is payable.

⁺ Working experience requirements:

- Minimum of 8 years of relevant working experience in relationship management
- Minimum of 1 year of relevant experience in the role that touches ALL areas of the competencies required for Job Role 6, ie. Team manager in which you are accountable for business bottom-line and involved in strategic decision-making of the department
- For more details, please visit FICS Online Certificate Guide at www.fics.org.sg

⁺⁺Competency Unit 5 for Wealth Management: Relationship Management (High Net Worth) – Perform Control and Monitoring Functions. For more information, please visit FICS Standards at www.fics.org.sg.

Please (✓)	Module	Fee before FSDF funding	Fees after FSDF funding* (please see note below)
	Modules I & II	S\$8,000	S\$2,000
	Module III	S\$6,000	S\$600
	Module IV	S\$6,000	S\$600
	Module V	S\$6,000	S\$600
	Module VI	S\$6,000	S\$600

Note:

1. The above fees after FSDF funding is applicable **only** for participants who sign up for the whole programme, ie., either sign up for:
 - i) All 6 modules, or
 - ii) All modules pertaining to the 'Relationship Management-High Net Worth' Job Family (Modules I, II, IV, V and VI), or
 - iii) All modules pertaining to the 'Investment Advisory Services' Job Family (Modules I, II, III and V).
2. Participants must join the programme in September 2010.

The above fees are indicative and subject to change.

* Participants may apply for funding under the Financial Sector Development Fund (FSDF) for Financial Industry Competency Standards (FICS) Training and Assessment Scheme[^] which provides funding support of 90% of the course fees, capped at S\$6,000 per participant per module. The above funding is applicable for programmes that commence



between 1 January 2009 and 31 December 2010. Funding is on a reimbursement basis and subject to eligibility criteria and terms and conditions.

^ Financial sector organizations sponsoring Singapore-based participants may obtain grant support from the FSDF for FICS accredited training and assessment programmes. Organizations should submit the funding applications online to the Institute of Banking & Finance (IBF) at www.ibf.org.sg. For Individuals (Singaporeans or Singapore permanent residents) who are not sponsored by financial sector organizations and would like to apply for the funding, please complete section 7. Non-sponsored individuals may also include GST for co-funding at 90% within the above cap. For more details on the scheme, please refer to the brochure available at our website www.wmi.com.sg or contact IBF at 6220-8566.

For information on application for absentee payroll with the Singapore Workforce Development Agency (WDA), please contact WMI at 6828-6988.

7. FUNDING (To be completed by non-sponsored individual)

Are you applying for funding under the FSDF Funding for Financial Industry Competency Standards (FICS) Training and Assessment Scheme?

Yes No

Please note that funding is on a reimbursement basis, subject to eligibility criteria and terms and conditions.

8. DECLARATION

I declare that the information provided in this application and sheets attached here are true to the best of my knowledge and belief and that I have not willfully suppressed any material fact. I also understand that if after the approval of the application, it is found that I have made a false declaration or willfully suppressed material facts, I may be required to withdraw from the programme, any tuition fee paid will not be refunded, and monies awarded under the FSDF Funding for Financial Industry Competency Standards (FICS) Training and Assessment Scheme if any will be recovered.

I understand that the offer of admission by the Wealth Management Institute and funding under the FSDF Funding for Financial Industry Competency Standards (FICS) Training and Assessment Scheme are conditional upon my satisfying all the prevailing criteria for admission and funding support.

Name of Applicant: (Dr/Mr/Mrs/Ms)*	
Applicant's Signature:	
Date: / /	

*Please delete accordingly



For company-sponsored candidate, the following should be completed by the sponsoring company/institution:

Name of Authorised Signatory: (Dr/Mr/Mrs/Ms)*	
Designation:	
Authorised Signature:	Company Stamp:
Date: / /	

**Please delete accordingly*

Contact Person: (Dr/Mr/Mrs/Ms)*	
Designation:	Email:
Phone No.:	Fax No.:
Company Mailing Address:	

**Please delete accordingly*

For Official Use

<input type="checkbox"/> AC	Processed by:
	Signature:
	Date:
	Contact No.: