



# WMI CERTIFICATE IN PRIVATE BANKING

## Application Form

(For Financial Institutions)

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### General Instructions

Thank you for your interest in the WMI Certificate in Private Banking programme. 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

Upon accepting the Institute's offer of placement in the programme, you will need to pay the full applicable tuition fee. Payment should be made by cheque in favour of "Wealth Management Institute Pte Ltd". The tuition fee is subject to applicable GST and is *non-refundable*.

Modules	Fees
Module I	S\$4,000
Module II	S\$6,200
Total Programme Fee	S\$10,200

*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  
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](mailto: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 checked)
  
- Photocopy of:
  - a) NRIC (for Singaporeans); or
  - b) Passport, Re-entry Permit, and/or Employment Pass (for Singapore Permanent Residents and/or Singapore-based foreigners)



**1. PERSONAL INFORMATION OF APPLICANT**

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
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. Service Assistant in Private Banking, Product Analyst, etc.)

**3. EMPLOYMENT HISTORY**

Total number of years of work 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.

<b>From</b> (mm/yy)	<b>To</b> (mm/yy)	<b>Organisation</b>	<b>Designation</b>	<b>Nature of Work</b> (e.g. Service Assistant in Private Banking)

**4. HIGH SCHOOL / POLYTECHNIC / COLLEGE / UNIVERSITY EDUCATION**

Please list in reverse chronological order.

<b>From</b> (mm/yy)	<b>To</b> (mm/yy)	<b>Name of Institution, Country</b>	<b>Highest Qualification Achieved, Major (if any)</b>

**5. OTHER QUALIFICATIONS**

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

<b>From</b> (mm/yy)	<b>To</b> (mm/yy)	<b>Professional Body</b>	<b>Discipline</b>	<b>Status</b>

## 6. PROGRAMME REGISTRATION

Please check ( ✓ ) the module(s) for which you are applying. Prospective participants who would like to attain the WMI Certificate in Private Banking would need to successfully complete both Modules I & II within the stipulated time frame. Prospective participants who have no prior knowledge in wealth management, or are fresh entrants in the wealth management industry, are strongly encouraged to enrol for *both* modules.

( ✓ )	Modules	Fees <i>before</i> FSDF funding	Estimated Fees <i>after</i> FSDF funding*
	Module I	S\$4,000	S\$400
	Module II	S\$6,200	S\$620
	<b>Total Programme Fee</b>	<b>S\$10,200</b>	<b>S\$1,020</b>

\* Participants may apply for funding under the Financial Sector Development Fund (FSDF) for the Financial Industry Competency Standards (FICS) Training and Assessment Scheme<sup>^</sup>, which provides funding support of 90% of the programme fees, capped at S\$6,000 per participant per module. The funding is provided on reimbursement basis and subject to eligibility criteria, and terms and conditions.

<sup>^</sup> Financial sector organisations sponsoring Singapore-based participants may obtain grant support from the FSDF for FICS accredited training and assessment programmes. Organisations should submit the funding applications online to the Institute of Banking & Finance (IBF) at [www.ibf.org.sg](http://www.ibf.org.sg). For more details on the Scheme, please refer to the relevant brochure at [www.wmi.com.sg](http://www.wmi.com.sg) or contact IBF at 6220 8566.

## 7. DECLARATION

- I declare that the information provided in this application form and sheets attached hereto 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 for 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 for the FICS Training and Assessment Scheme are conditional upon my satisfying all the prevailing criteria for admission and funding support.
- I understand that I have to pass all assessments and fulfill full attendance requirement to be awarded the WMI Certificate of Achievement/WMI Certificate in Private Banking.

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

\*Please delete accordingly.



**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.*

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**For Official Use**

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