

## WMI Certificate in Private Banking

### Programme Structure and Curriculum

The programme curriculum covers the technical aspects as well as the sales, relationship and advisory aspects of the business. The two-month programme is based on the following modular structure:

<b>Module I</b> <b>(Regulatory Requirements &amp; Product Knowledge)</b>	<b>Module II</b> <b>(Relationship Management)</b>
<ul style="list-style-type: none"> <li>• Overview of the Private Banking Business</li> <li>• Corporate Finance</li> <li>• Equities &amp; Fixed Income</li> <li>• Foreign Exchange &amp; Money Market</li> <li>• Derivatives &amp; Structured Products</li> <li>• Private Equity &amp; Hedge Funds</li> <li>• Real Estate &amp; REITs</li> <li>• Trust, Tax &amp; Estate Planning</li> <li>• Insurance</li> <li>• Ethics</li> <li>• Credit &amp; Risk Management</li> </ul>	<ul style="list-style-type: none"> <li>• Investment Process</li> <li>• Wealth Planning, Preservation &amp; Enhancement</li> <li>• The Psychology of Being A Trusted Advisor</li> <li>• Effective Networking &amp; Asking for Referrals</li> <li>• Client Relationship Management</li> <li>• Consultative Selling</li> <li>• Look the Part, Talk the Talk</li> </ul>

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.

### Course Assessment

Participants who have successfully completed *either* module and passed *all* required assessments within the stipulated time frame will be awarded:

- a Certificate of Achievement by WMI
- the Statements of Attainment (SOAs) issued by the Institute of Banking & Finance (IBF)

Participants who have successfully completed *both* modules within the stipulated time frame and passed *all* required assessments will be:

- awarded the WMI Certificate in Private Banking
- awarded the SOAs issued by the IBF
- exempted from Module 6 of the Capital Markets and Financial Advisory Services Examination



## Programme Fee and Funding

The programme fees cover tuition and course materials, and is subject to applicable GST.

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>

*The above fees are indicative and subject to change.*

\* 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 IBF at [www.ibf.org.sg](http://www.ibf.org.sg). Non-sponsored participants (Singaporeans or Singapore Permanent Residents) may approach the Wealth Management Institute for more information on their claim. Non-sponsored participants may also include GST for co-funding at 90% within the above cap. 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.

## Programme Schedule

Each module spans four to five weeks. Weekly lessons will be conducted over two weekday sessions (Tuesdays and Thursdays, 7.00pm - 10.00pm) and one weekend session (Saturdays, full day).

## Application

Application for the September - November 2010 class is open.

To apply, please send your application form, the supporting documents and cheque payment (to be in favour of "Wealth Management Institute Pte Ltd") of S\$85.00 as application fee by mail to:

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

Shortlisted applicants will be notified and invited for interview.

*For further information updates on the programme, please visit [www.wmi.com.sg](http://www.wmi.com.sg).*

*Updated as at March 2010.*