

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:

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

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
Total Programme Fee	S\$10,200	S\$1,020

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[^], 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.

[^] 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. 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 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). Programme schedule for the September-November 2010 class is as follows:

Modules	Start Dates	End Dates
Module I	14 September 2010	7 October 2010
Module II	19 October 2010	13 November 2010

The above dates and timings are indicative and subject to change. Participants will receive the finalised schedule nearer the commencement of the programme.

Application

Application for the September-November 2010 class closes **31 July 2010**.

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.

Updated as at May 2010