



For Official Use

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| PBWM Intake 3 | |
| FI | |
| Name | |

WMI PRIVATE BANKING WEALTH MANAGEMENT PROGRAMME (PBWM) Application Form

General Instructions

Thank you for your interest in the WMI Private Banking Wealth Management Programme. Please read the following instructions carefully before completing the application form. Supplementary instructions are given in each section of the form. 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. *Early application is strongly encouraged.*

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 / cashier's order in favour of "Wealth Management Institute Pte Ltd". The tuition fee is subject to applicable GST and is *non-refundable*.

| Programme | Fee |
|---|------------|
| Private Banking Wealth Management Programme | S\$10,800 |

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

Self-sponsored applicants will be notified and invited for interview.

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

CHECKLIST

| | |
|--|--|
| Applicant's Name as in NRIC / Employment Pass | |
| Applicant's NRIC No. / FIN | |

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 Non-refundable Application Fee (S\$85.00)
- Application Form (including this checklist, duly checked)
- Copy of:
 - a) NRIC (for Singaporeans / Singapore Permanent Residents); or
 - b) Employment Pass, Passport and/or Re-entry Permit (for Singapore-based foreigners)
- Copies of CACS Assessment result slips (if applicant has passed the assessments)

For self-sponsored applicants, please include the following documents as well:

- Copies of official academic transcripts from the polytechnic, college, university or graduate institutions that you have attended. Non-English transcripts must be accompanied by a notarised English translation.
- Personal Statement
- Current Resume
- Any other supporting documents

1. PERSONAL INFORMATION OF APPLICANT

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

| | |
|--|--|
| Name (as in NRIC or Employment Pass) ()* | |
| Mailing Address | |
| Contact Nos. Office : Mobile Phone : Home : | Office Email Personal Email |
| Date of Birth (dd/mm/yyyy): | Gender: M / F* |
| Dietary Restriction | |
| Nationality | Country of Birth |
| For Singapore Citizen or Permanent Resident NRIC No.: | |
| For Singapore-based Foreigners Do you currently possess a valid employment pass? Yes / No* Please provide your Foreign Identification No. (FIN): | |

*Please select accordingly.

2. EMPLOYMENT HISTORY

Total years of banking experience before joining Private Banking: years

Please give a breakdown of these total years, where applicable:

Personal Banking years | **Priority Banking** years | **Other areas of Banking** years

Private Banking Experience: years

2a. Current Employment

| | |
|---|---------------------------------|
| Name of Company | Date of Joining (mm/yy): |
| Company Address | |
| Department at which you are working (E.g. Private Banking, Commercial Banking, IT, etc.) | |
| Designation as per Namecard | Corporate Rank |
| Nature of Work (E.g. Service Assistant in Private Banking, Product Analyst, etc.) | |

2b. Previous Employment

Please indicate previous full-time work experiences, starting with the most recent/current employer. 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. Service Assistant in Private Banking) |
|------------------------|----------------------|---------------------|--------------------|---|
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3. POST UNIVERSITY / UNIVERSITY / POLYTECHNIC / COLLEGE / HIGH SCHOOL EDUCATION

Please indicate your educational background, starting with the most recent school attended.

| From (mm/yy) | To (mm/yy) | Name of Institution, Country | Highest Qualification Achieved (PhD / Masters / Bachelor / Graduate Diploma / Advanced Diploma / Diploma / 'A' Level / 'O' Level) | Major(s) / Field of Study |
|------------------------|----------------------|---|--|--------------------------------------|
| | | | | |
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4. OTHER QUALIFICATIONS

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

| From (mm/yy) | To (mm/yy) | Professional Body | Discipline | Status |
|------------------------|----------------------|--------------------------|-------------------|---------------|
| | | | | |
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Have you passed the CACS Paper 1 & 2?

- Yes No

If yes, please indicate the Paper(s) passed and the date(s) of Assessment(s).

| CACS Paper(s) | CACS Assessment Date(s) |
|---------------|-------------------------|
| CACS Paper 1 | |
| CACS Paper 2 | |

If no, please indicate if you intend to take the CACS Paper(s):

- Yes No

5. PROGRAMME FEES AND FUNDING

| Fees before IBF-STF funding (before prevailing GST) | Estimated Fees after IBF-STF funding [†] (before prevailing GST) |
|---|---|
| S\$10,800 | S\$3,800 |

[†] Applicants (Singaporeans or Singapore Permanent Residents) have to successfully complete CACS Paper 1 and 2 in order to be eligible for the **IBF Standards Training Scheme (IBF-STF)**[^] under the Financial Sector Development Fund (FSDF). IBF-STF funding provides 70% of the IBF Standards accredited programme fee, capped at S\$7,000 per participant per programme. IBF-STF funding does not support GST except for self-sponsored individuals. The grant is disbursed on a reimbursement basis and subject to eligibility criteria, and terms and conditions.

[^] Singapore-based financial sector entities sponsoring staff (Singaporeans or Singapore Permanent Residents) may obtain the IBF-STF funding for IBF Standards accredited programme and submit the claims to IBF. For details on the claims submission procedure and requirements, please contact IBF at funding@ibf.org.sg. Non-company sponsored individuals (Singaporeans or Singapore Permanent Residents) may approach WMI for more information on their claims. For more details on IBF-STF, please refer to <https://www.ibf.org.sg/programmes/Pages/IBF-STF.aspx>.

6. SUPPLEMENTARY INFORMATION

6a. Are you currently pursuing any other programmes?

- Yes, please specify: _____
 No

6b. Have you ever been convicted of a criminal offence by a court of law of any country?

- Yes, please specify: _____
 No

6c. How did you find out about the programme?

- Newspapers WMI Website My Company
 IBF Website MAS Website Word of Mouth
 Others, please specify: _____

7. FOR SELF-SPONSORED INDIVIDUAL ONLY: PERSONAL STATEMENT

Share with us, in no more than 500 words, your motivation to enroll in the programme and your aspirations beyond the programme. Please enclose your statement on separate sheet(s) and include your name and contact number(s) on all pages of your statement.

8. 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 for IBF-STs under the FSDF if any will be recovered.
- I declare that I am not in receipt of any previous or other grants or subsidies, provided either by FSDF and/or other government agencies, for the claims for this specific programme.
- I understand that the offer of admission by WMI and funding IBF-STs under the FSDF 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 relevant certificates issued by WMI and IBF.
- I confirm that I have fully read and understood the WMI Privacy Policy and Terms of Use outlined in the WMI website (<http://www.wmi.com.sg/terms-of-use/privacy-statement.html>).

Name of Applicant:
()*

Applicant's Signature:

Date:

**Please select accordingly.*



The following should be completed by the sponsoring company / institution:

| | |
|--|-----------------------|
| Name of Authorised Signatory: ()* | |
| Designation: | |
| Authorised Signature: | Company Stamp: |
| Date: | |

**Please select accordingly.*

| | |
|---------------------------------|-----------------|
| Contact Person: ()* | |
| Designation: | Email: |
| Phone No.: | Fax No.: |
| Company Mailing Address: | |

**Please select accordingly.*

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| <input type="checkbox"/> AC | Processed by: |
| | Signature / Date: |