



WMI CERTIFICATE IN TRUST SERVICES INTAKE 8 - APPLICATION FORM

General Instructions

Thank you for your interest in the **WMI Certificate in Trust Services Programme**.

Please read the following instructions carefully before completing the application form. Supplementary instructions are provided in each section of the form. Please complete the sections accordingly and provide the supporting documents as required.

We suggest you retain a copy of the completed application 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 nett. Applications received without the application fees will not be processed. Payment should be made by cheque in favor 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 favor of "Wealth Management Institute Pte Ltd".

The tuition fee is subject to applicable GST and is non-refundable.

Programme	Fee
WMI Certificate in Trust Services	S\$6,000

Note: The above fees are indicative and subject to change.

Application

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

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

Non-company sponsored applicants will be notified and invited for an interview.

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

CHECKLIST

Applicant's Full Name as in NRIC / Employment Pass	
Applicant's NRIC / FIN	

Application Form and Supporting Documents

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

Cheque payment for application fee (S\$85.00)

Application form (including this checklist duly completed)

Copy of:

- a) NRIC (for Singaporeans / Singapore Permanent Residents); or
- b) Employment Pass, Passport and/or Re-entry Permit (for Singapore-based foreigners)

For **non-company sponsored applicant**, 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 notarized English translation.

Personal Statement (Provide in less than 200 words on your motivation in wanting to enter the programme and your aspirations beyond the programme)

Current resume

Any other supporting documents

1. PERSONAL INFORMATION OF APPLICANT

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

Please complete all fields.

Name as in NRIC / Work Pass (Please underline <u>Surname / Family Name</u>)	
Mailing Address	
<u>Contact Nos.</u>	Company Email Address
Office :	Personal Email Address
Mobile Phone :	
Home :	
Date of Birth (dd/mm/yyyy):	Gender: Age:
Dietary Restriction (if any):	
Nationality	Country of Birth
<u>For Singapore Citizen or Permanent Resident</u> NRIC No.:	
<u>For Singapore-based Foreigners</u> Do you currently possess a valid employment pass? Please provide your Foreign Identification No. (FIN):	

2. CURRENT EMPLOYMENT

Name of Company:
Date of Joining (mm / yy):
Company Address:
Department at which you are working:
Designation as per Namecard:
Nature of Work (E.g. Trust Relationship Manager, Resident Manager, etc.)

3. EMPLOYMENT HISTORY

Total number of years of working experience: years

Total number of years of work experience in trust industry: years

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

4. HIGH SCHOOL / POLYTECHNIC / COLLEGE / UNIVERSITY 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

5. OTHER QUALIFICATIONS

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

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

6. PROGRAMME FEES AND FUNDING

Fees <u>before</u> IBF-STs funding (before prevailing GST)	Estimated Fees <u>after</u> IBF-STs funding (before prevailing GST)
S\$6,000	S\$1,800

IBF Standards Training Scheme

The IBF Standards Training Scheme ("IBF-STs") provides funding for training and assessment programmes accredited under the IBF Standards. The WMI Certificate in Trust Services Programme is currently listed as an eligible IBF-STs external programme.

Funding Quantum

IBF-STs provides 70% funding for direct training costs subject to cap of S\$7,000 per participant per programme. Direct training cost would be based on the programme fee charged by the external training provider or apportioned basic salaries of internal staff involved in developing and/or delivering in-house programmes.

For all IBF-STs programmes commencing on or after 1 July 2016, Singapore Citizens aged 40 years old and above will be eligible for 90% co-funding of direct training costs, subject to existing grant caps of S\$7,000 per programme. Singapore Permanent Residents will continue to be eligible for 70% co-funding of direct training costs for IBF-STs programmes.

Eligible Participants

This scheme is eligible for company-sponsored or non-company sponsored participants who are Singapore Citizens or Singapore Permanent Residents, physically based in Singapore, and who have successfully completed the WMI Certificate in Trust Services Programme, an IBF-STs accredited programme. Financial Institutions (MAS licensed or exempt entities), involved in or supporting financial sector activities, are eligible to submit claims for company-sponsored participants. WMI will submit claims for non company-sponsored participants. The grant is disbursed on a reimbursement basis and subject to eligibility criteria, and terms and conditions.

For details on the claims submission procedure and requirements, please contact IBF at funding@ibf.org.sg. For more details on IBF-STs, please refer to <https://www.ibf.org.sg/programmes/Pages/IBF-STs.aspx>.

6a. To be completed by non-company sponsored individual only:

Are you applying for funding under the FSDF Funding for IBF-Standards Training Scheme (IBF-STs)?

Yes No

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

7. SUPPLEMENTARY INFORMATION

7a. Are you currently pursuing any other programmes?

Yes, please specify: _____

No

7b. How did you find out about the programme?

WMI Website

WMI Events

STA Events

My Company

Word of Mouth

Others, please specify: _____

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 under the FPDF Funding for IBF Standards Training Scheme (IBF- STS) if any, will be recovered.

I declare that I am not in receipt of any previous or other grants or subsidies, provided either by FPDF and/or other government agencies, for the claims for this specific programme.

I understand that the offer of admission by the Wealth Management Institute and funding under the FPDF Funding for IBF Standards Training Scheme (IBF – STS) are conditional upon my satisfying all the prevailing criteria for admission and funding support.

I understand that I have to pass all assessments and fulfil 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: (dd/mm/yy):

* Please delete accordingly

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

Name of Authorised Signatory: *	
Designation:	
Office Number:	Company Email Address:
Authorised Signature:	
Date (dd/mm/yy):	Company Stamp

Contact Person: *	
Company Mailing Address:	
Designation:	Company Email Address:
Phone No:	Fax No:

For Official Use

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

** Please delete accordingly*