



# WMI ADVANCED CERTIFICATE IN TRUST SERVICES Application Form

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## General Instructions

Thank you for your interest in the WMI Advanced Certificate in Trust Services Programme. Please read the following instructions carefully before completing the application form. Please complete the sections accordingly and provide the supporting documents as required. We suggest you retain a copy of your completed application form for personal record. Your 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 the 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. The tuition fee is subject to applicable GST and is non-refundable.

Modules	Fee
Advanced Trust Administration (ATA)	S\$4,500
Advanced Trust & Estate Planning (ATEP)	S\$3,500
Total Programme Fee	S\$8,000

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

- For company-sponsored applicants, the payment of the tuition fee should be made by cheque in favour of "Wealth Management Institute Pte Ltd".
- For individual applicants, the payment of the tuition fee should be made by cashier's order in favour of "Wealth Management Institute Pte Ltd".

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

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

## For more information, please contact:

Tel: (65) 6828-6988  
Fax: (65) 6821-1155  
E-mail: [exec.devt@wmi.com.sg](mailto:exec.devt@wmi.com.sg)  
Website: [www.wmi.com.sg](http://www.wmi.com.sg)



## **CHECKLIST**

### **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)
  
- Photocopy of:
  - a) NRIC (for Singaporean); or
  
  - b) Passport, Re-entry Permit, and/or Employment Pass (for Singapore permanent residents and/or Singapore-based foreigners)

For individual applicants, please include the following documents as well.

- Official academic transcripts of all educational institutions attended
  
- Current resume
  
- Any other supporting documents

**1. PERSONAL INFORMATION OF CANDIDATE**

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

Name (as in NRIC or Passport): (Dr / Mr / Mrs /Ms)*		
Address:		
Telephone No. Home:	Office:	Mobile Phone:
E-Mail Address:	Date of Birth (dd/mm/yyyy):	
Gender:            M / F*	Age:	
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? <input type="checkbox"/> Yes <input type="checkbox"/> No Please provide your Foreign Identification Number:		

\* Please delete accordingly

**2. COMPANY INFORMATION**

Company Name:
Address:

**3. HIGH SCHOOL / POLYTECHNIC / COLLEGE / UNIVERSITY EDUCATION  
(Please provide in reverse chronological order)**

From (mm/yy)	To (mm/yy)	Name of Institution, Country	Highest qualification achieved, Major (if any)

**4. OTHER QUALIFICATIONS**

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

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

**5. EMPLOYMENT HISTORY**

Please start with the most recent employment and indicate only full-time work experiences. Please exclude full-time national service and part-time, temporary and vacation jobs.

Total number of years of working experience  years

From (mm/yy)	To (mm/yy)	Organisation	Designation	Nature of Work

## 6. PROGRAMME REGISTRATION

Please check (✓) in the boxes against the module(s) for which you are applying.

(✓)	Module	Fees before FPDF funding	Estimated Fees after FPDF funding*
	Advanced Trust Administration (ATA)	S\$4,500	S\$1,350
	Advanced Trust & Estate Planning (ATEP)	S\$3,500	S\$1,050
	<b>Total Programme Fee</b>	<b>S\$8,000</b>	<b>S\$2,400</b>

\* Participants may apply for the **Financial Sector Development Fund (FPDF) grant support under the Financial Industry Competency Standards (FICS) Training and Assessment Scheme<sup>^</sup>**. For programmes commencing on or after 1 January 2011, the grant support is 70% of the programme fee capped at S\$4,200 per participant per module. The grant does not support GST except for non-company sponsored individuals. The grant is disbursed on a reimbursement basis and subject to eligibility criteria, and terms and conditions.

<sup>^</sup> *Financial sector organizations sponsoring Singapore-based participants may obtain the FPDF grant support for FICS accredited training and assessment programmes. **Organizations** should obtain the prescribed funding application forms from MAS's Financial Sector Development Fund (FPDF) Secretariat (email: fsdf@mas.gov.sg) and submit to them. **Non-company sponsored individuals** (Singaporeans or Singapore permanent residents) may approach the Wealth Management Institute for more information on their claims. For more details on the scheme, please refer to the brochure available at our website [www.wmi.com.sg](http://www.wmi.com.sg).*

## 7. FUNDING (to be completed by non-sponsored individual)

Are you applying for funding under the FPDF Funding for Financial Industry Competency Standards (FICS) Training and Assessment Scheme?

Yes       No

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

## 8. OTHER INFORMATION

Dietary requirement (e.g. vegetarian):
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**9. DECLARATION**

I declare that the information provided in this application form and sheets attached here 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 Financial Industry Competency Standards (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 FPDF Funding for Financial Industry Competency Standards (FICS) Training and Assessment Scheme are conditional upon my satisfying all the prevailing criteria for admission and funding support.

Name of candidate: (Dr / Mr / Mrs / Ms)*
Signature:
Date:     /     /

\* Please delete accordingly

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

Name of Authorised Signatory: (Dr / Mr / Mrs / Ms)*	
Designation:	Email:
Phone No:	Fax No:
Authorised Signature:	
Company Stamp	Date:    /    /

Contact Person: (Dr / Mr / Mrs / Ms)*	
Address:	
Designation:	E-Mail:
Phone No:	Fax No:

**For Official Use**

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

\* Please delete accordingly