



The Wealth Management Institute (WMI) is proud to be appointed by the Institute of Banking and Finance (IBF) as the lead provider of the Client Advisor Competency Standards (CACS) training programmes.

The WMI CACS training programmes offer core training which leads on to the WMI Certificate in Private Banking Programme and/or WMI Advanced Wealth Management Programme. The WMI programmes provide an integrated training pathway that leads you to the Financial Industry Competency Standards (FICS) Certification.

CACS – YOUR PASSPORT TO FICS CERTIFICATION

Client Advisors who have passed the CACS Assessment can proceed to complete the WMI Certificate in Private Banking (CPB) Programme and/or Advanced Wealth Management Programme (AWMP). Thereafter, with the relevant work experience, they will be able to obtain the FICS Certification under the job family of Wealth Management: Relationship Management - High Net Worth (Job Role IV or V) from the IBF.



WMI CACS Non-Examinable Course

is designed for exempt wealth management professionals who have at least 15 years of relevant financial advisory service experience and are not required to undertake the CACS Assessment as prescribed by the Singapore Private Banking Code of Conduct. The Course will enable its candidates to refresh their knowledge and be kept abreast of the current legislation, regulation and industry codes of conduct governing the private banking industry in Singapore.

WMI CACS Preparatory Course

is designed for wealth management professionals who are in client facing roles and provide financial advisory services to High Net Worth Individuals as prescribed by the Private Banking Code of Conduct. The Course will train its candidates for the CACS Assessment through comprehensive teaching and summary of the core concepts in the CACS study guide. A mock test session towards the end of the Course will aid its candidates in gearing up for the CACS Assessment.