

Thank you for choosing WMI Advanced Diploma in Wealth Management (ADWM). Please complete the application and email the completed form and all required documents to openprog@wmi.edu.sg.

ADMISSION CRITERIA

Minimum Education	Diploma or equivalent
Minimum Work Experience	3 years' relevant experience
Minimum English Proficiency requirement (only if English was not the medium of instruction used at the highest qualification)	TOEFL score > 100 IBT or IELTS score > 6.5

WMI will consider exceptions on a case-by-case basis and if needed, an interview may be requested.






GRADUATION CRITERIA

- Successful completion of all six 19.5-hour course and assessments
- Successful completion of the 8-hour Ethics, Rules & Regulations course and assessment
- Achieve a minimum CGPA of 2.50 at the completion of the Advanced Diploma
- Complete the Advanced Diploma within 3 years from the date of admission of the first course taken

Upon meeting all Graduation Criteria, participants will be awarded "Advanced Diploma in Wealth Management".

CERTIFICATION

The Advanced Diploma in Wealth Management will lead to the following:

	Participant without Private Banking experience	Participant with less than 3 years in relevant or Private Banking experience	Participant with at least 3 years in relevant or Private Banking experience
 <p>WMI Certification WMI Certificate of Achievement CACAS CPD hours (IBF-STC and Core FAA/SFA CPD)</p>	✓	✓	✓
 <p>Advanced Diploma Qualification Upon meeting all Graduation Criteria listed above, participants will be awarded "Advanced Diploma in Wealth Management".</p>	✓	✓	✓
 <p>IBF Certification* Participant who successfully completes this Advanced Diploma in Wealth Management programme can apply with IBF for the certification.</p>	Not Applicable	 <p>IBF Qualified (Level 1) in Private Banking & Wealth Management (Relationship & Sales Management)</p>	 <p>IBF Advanced (Level 2) in Private Banking & Wealth Management (Relationship & Sales Management)</p>

*Participants applying for IBF Certification must meet all other relevant IBF certification criteria.

*Sponsoring Companies will apply directly with IBF for this certificate on behalf of their sponsored participants.

CONTACT US

Contact: 6904 7327 (Press 3 for Public Run Programmes)

Email: openprog@wmi.edu.sg

Before submitting this application, please ensure that you have enclosed all items under ‘Application Checklist’.

Application Checklist

- Copy of NRIC / Work Permit / S-Pass / Employment Pass (Front and Back)
- 1 passport size photograph with white background (High resolution in JPEG format, taken within the last 6 months)
- Certified true copies of your highest academic qualification educational transcript
- Full resume or CV
- Copy of CACS Assessment result slips (only applicable to Covered Persons in Private Banking or serving HNW clients)
- Proof of TOEFL, IBF or IELTS English Proficiency (where applicable)
- Any other supporting documents

Programme Fees and Funding

Fee per Application: \$85.00 (*non-refundable*)

Modules	Full Fees (S\$)	Fees after 90% IBF-STS Course Fee Subsidy + 5% IBF Credit (Applicable till 30 June 2021) (For Singaporeans / PR) (S\$)	
		Company-Sponsored	Self-Sponsored
Investment Advisory	3,584.50	402.00	179.23
Investment Product Strategies	3,584.50	402.00	179.23
Data Science and Fintech I	3,584.50	402.00	179.23
Advanced Wealth Planning, Family Office and Business Succession	3,584.50	402.00	179.23
Client Relationship Management	3,905.50	620.50	390.55
Ethics, Rules and Regulations	642.00	102.00	64.20
Cross Banking	3,650.00	365.00	365.00

All seven courses modules have been individually accredited to IBF-Standards Training Scheme and are eligible for IBF funding and CPD hours.

Declaration and Authorisation

By completing and submitting this application form, I (the individual applicant) and/or we (the Sponsoring Company):

- Declare that the information provided is true to the best of my/our knowledge and belief and that I/we have not willfully suppressed any material fact. I/We also understand that if after the approval of the application, it is found that I/we have made a false declaration or willfully suppressed material facts, I/We may be required to withdraw from the programme, any tuition fee paid will not be refunded and monies awarded for IBF-STS (if any) will be recovered from me/us;
- Have not received nor applied for any grants or subsidies provided by IBF and/or other government agencies with regard to this course under WMI. I/We agree to all other WMI's Terms & Conditions governing registration, payment, cancellation, deferment and no-show as outlined in the WMI website (<https://wmi.edu.sg/programmes/private-banking/funds-grants-tcs/>) and accepts that WMI reserves the right to amend these terms & conditions from time to time and where necessary;
- Understand that the offer of admission by WMI and/or IBF-STS funding (if any) is/are conditional upon my/the applicant's satisfying all the prevailing criteria for admission and funding support and WMI reserves the discretion to decline an admission for reasons beyond the minimum admission criteria. I/We understand the ADWM modules will be offered by both Wealth Management Institute Limited and Wealth Management Institute International Pte Ltd, the Advanced Diploma in Wealth Management qualification issued by Wealth Management Institute International Pte Ltd.
- In the event WMI is unable to claim the "Funded Course Fee" (i.e. subsidised IBF-STS amount and/or IBF Credit) due to the information in this form being inaccurate or untrue, or if I/the sponsored applicant am/is no longer with the Sponsoring Company, or have/has withdrawn or did not successfully complete the course and assessments, or for any other reason which results in IBF rejecting WMI's claim, I/We will pay WMI in full for the "Funded Course Fee" within 14 calendar days from the date of IBF's rejection.
- Agree that information provided may be used by WMI for this course or other subsequent courses and WMI will collect, use and disclose the personal data in accordance with the Personal Data Protection Act 2012. I/We have read and understood the WMI Personal Data Protection Statement outlined in the Privacy Statement at <https://wmi.edu.sg/privacy-policy.html>.

1. Personal Details (please fill the form in BLOCK LETTERS)

Title	Name (as in NRIC or Passport)		
NRIC/Passport No.	Identity or Pass Type		Nationality
Date of Birth	Contact (Mobile)	(Office)	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female
Mailing Address			
Email Address (Office)		(Personal)	

2. Employment Summary

Total Working Experience (years)	Private Banking Experience <input type="checkbox"/> Yes, please specify (years) <input type="checkbox"/> No
Name of Current Company	Date Joined (mm/yy)
Designation	Nature of Work
Department	Company Sponsored <input type="checkbox"/> Yes <input type="checkbox"/> No

Previous Employment Experience (please indicate full-time work experiences starting with the most recent employer)

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

3. Education & Qualification (Certified true copies of degree, diploma, official transcripts and certifications must be attached)

Academic Qualifications (Post University, University, Polytechnic, College, High School)

From (mm/yy)	To (mm/yy)	Name of Institution, Country	Highest Qualification Achieved	Major(s)/Field of Study

Professional & Other Qualifications (example: CFA, ACCA, etc.)

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

Was English the medium of instruction used at the highest academic qualification? Yes No

If the above selection is "No", please submit your TOEFL, IBT or IELTS Score:

4. Supplementary Information

Are you currently pursuing any other programmes? Yes, please specify _____ No

Have you ever been convicted of a criminal offence by a court of law of any country? Yes, please specify _____ No

How did you find out about the programme? WMI Website IBF Website EDM Word of Mouth Others _____

5. Declaration

I hereby declare that the information given in this form is true and complete.

Signature of Applicant _____

Date _____



APPLICATION FOR ADVANCED DIPLOMA IN WEALTH MANAGEMENT

(FOR COMPANY SPONSORED INDIVIDUALS ONLY)

The following should be completed by the sponsoring company:

Authorised Signatory

Title	Name of Authorised Signatory
Designation	

I declare that the following applicant will be sponsored by our company:

Applicant's Name:

Applicant's NRIC:

Authorised Signature

Company Stamp/Date

Operation and Billing Contact

Title	Name of Billing Contact Person
Designation	
Contact	
Email Address	
Company Address & UEN Number	

(If Operation Contact differs from Billing Contact)

Title	Name of Operation Contact Person
Designation	
Contact	
Email Address	