

Priority & Retail Banking Certified Adviser (PRCA) Level 2

The Priority & Retail Banking Certified Adviser (PRCA) Level 2 is the leading programme for individuals in a client advisory role managing affluent clients. Through this programme, participants will gain applied skills, knowledge and best practices on improving sales outcomes using an advisory approach, deepening relationships by uncovering needs, and adopting proper planning to assess client and product suitability.

Curriculum

This programme comprises five modules, each either taken on its own or taken together to achieve certification and complete coverage of competencies. Modules feature a combination of teaching, interactive learning tools, class discussions and role plays to plan, prepare, engage, position and pitch suitable solutions for new and existing clients.

Modules:

1. Client Advisory (Sales Strategy)
2. Wealth Advisory (Client Investment Suitability and Product Solutions)
3. Wealth Advisory (Financial and Investment Planning)
4. Client Advisory (Relationship Management)
5. FA CPD Online Learning (Ethics, Rules & Regulations)

Participants will be eligible for the IBF Advanced (Level 2) Certification in Retail Banking (Sales & Relationship Management) upon successful completion. Terms & conditions apply.

Fees & Funding

PRCA is accredited under Institute of Banking and Finance Standard Training Scheme (IBF-STs). Singaporeans and Permanent Residents (PR) are eligible for enhanced fee subsidies. WMI will invoice based on fees after subsidies and inclusive of GST.

	Fees before Subsidy (incl. of GST)	Fees <u>after</u> IBF Subsidy (incl. of GST)			
		Singaporean Age Below 40 / PR (70%* IBF-STs Funding)		Singaporean Age 40 & Above (90% IBF-STs Funding)	
		Company-Sponsored	Self-Sponsored	Company-Sponsored	Self-Sponsored
Module 1,2	S\$1979.50	S\$684.50	S\$593.85	S\$314.50	S\$197.95
Module 3,4	S\$1,765.50	S\$610.50	S\$529.65	S\$280.50	S\$176.55
Module 5	S\$481.50	S\$166.50	S\$144.45	S\$76.50	S\$48.15

Contact Us

For more details or to register, please email us at openprog@wmi.edu.sg