

Certification User Guide for Individual Login

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Apply for Certification

Apply for IBF Portal Log-in

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2. Create IBF portal account login for “INDIVIDUAL”

IBF Singapore

Welcome to IBF Portal Login

You are required to create an IBF Portal Account to access IBF's e-services.

Don't have an account? Create [Individual Account](#) [Corporate Account](#)

Login as: Individual Corporate

NRIC / FIN / Passport No.:

User Password:

[Forgot your password?](#)

Log in

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- 3.1 After account is created, log into the portal using your NRIC and Password. You will be re-directed to the User Dashboard. Click on Certification to begin the application process.



- 3.2 You will then come to the Certification Application which comprises of 4 steps:

1. Application Form

2. Confirm Application

3. Payment (**Kindly note that there will be no Certification Fee Charged until further notice**)

4. Completion

Section 1: Your personal particulars are auto populated in this section.

Section 1. Applicant Details

Please provide us with your personal particulars. Updates to your details will be reflected in your personal profile.

Salutation:	<input checked="" type="radio"/> Mr	<input type="radio"/> Ms	<input type="radio"/> Mrs	<input type="radio"/> Mdm	<input type="radio"/> Dr/Prof
Full Name (as stated in NRIC / FIN Passport):	<input type="text" value="Cheng Tai Keng"/>				
ID Type:	<input type="text" value="Singapore Citizen"/>				
NRIC / Fin No.:	<input type="text" value="S0597095D"/>				
Nationality:	<input type="text" value="Singapore"/>				
Organisation:	<input type="text" value="IBF"/>				
Designation:	<input type="text" value="Manager"/>				
Office Email:	<input type="text" value="345@ibf.org.sg"/>				
Personal Email:	<input type="text" value="62353535@yahoo.com"/>				
Office Number:	<input type="text" value="62208566"/>				
Mobile Number:	<input type="text" value="62208566"/>				
Address: * Please note that all hard-copy correspondences and will be delivered to this address.					
Building Name	<input type="text" value="MAS Building"/>	Building No.	<input type="text" value="10"/>		
Street Name	<input type="text" value="Shenton Way"/>	Unit No.	<input type="text" value="13-07"/>		
Country	<input type="text" value="Singapore"/>	Postal Code	<input type="text" value="079117"/>		

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Section 2:

3.3 Select the **Training Provider** that you have completed the IBF Standards Accredited Programme with.

Section 2. Programme Details

Please select your training provider and the training programme(s) that you have completed, in fulfilling this certification requirement. You may add more than one programme where relevant (for modular programmes).

Training Provider:

Programme Title:

[Add Programme](#)

Training Provider	Programme Title	Programme Level	Action
-------------------	-----------------	-----------------	--------

Completion Date:

Select **“Financial Planning Association of Singapore”** or **“Singapore College of Insurance Limited”**

Sample of the drop down box to select from is in the next screenshot.

Section 2. Programme Details

Please select your training provider and the training programme(s) that you have completed, in fulfilling this certification requirement. You may add more than one programme where relevant (for modular programmes).

Training Provider:

Programme Title:

[Add Programme](#)

Training Provider	Programme Title	Programme Level	Action
-------------------	-----------------	-----------------	--------

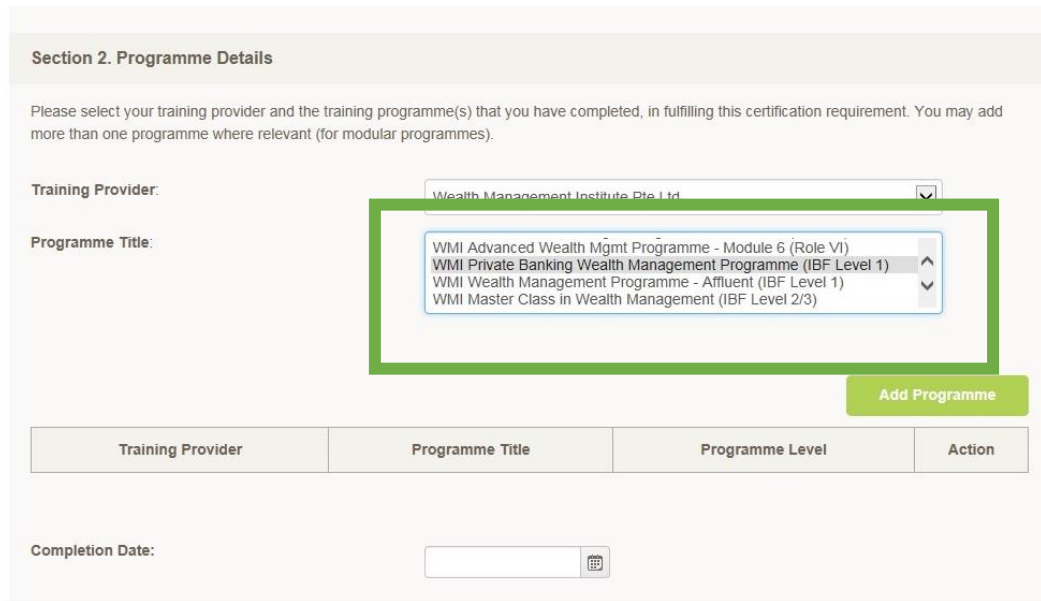
Completion Date:

- Select-
- AUSTRALIA & NEW ZEALAND BANKING GROUP LIMITED
- Bank of Singapore Limited
- BNP Paribas Wealth Management
- CFA Singapore
- Credit Suisse AG
- CyberQuote Pte Ltd
- DBS Bank Ltd.
- Financial IT Academy, SMU-School of Information Systems
- Financial Planning Association of Singapore
- Financial Training Institute @ Singapore Management University
- IBF TEST 3
- IBF TEST A
- IBF Test B
- International Compliance Training Academy Pte. Ltd.
- NANYANG POLYTECHNIC
- Omega Performance Corporation Asia Pacific
- Oversea-Chinese Banking Corporation Limited
- Singapore College of Insurance Limited
- Singapore Exchange Limited
- Standard Chartered Bank (Singapore) Limited
- Temasek Polytechnic
- The Institute of Banking and Finance
- UBS AG
- United Overseas Bank Limited
- Wealth Management Institute Pte Ltd

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3.4 Choose the **Programme** that you have completed.

Sample of the drop down box to select from is in the next screenshot



Section 2. Programme Details

Please select your training provider and the training programme(s) that you have completed, in fulfilling this certification requirement. You may add more than one programme where relevant (for modular programmes).

Training Provider:

Programme Title:
WMI Private Banking Wealth Management Programme (IBF Level 1)
WMI Wealth Management Programme - Affluent (IBF Level 1)
WMI Master Class in Wealth Management (IBF Level 2/3)

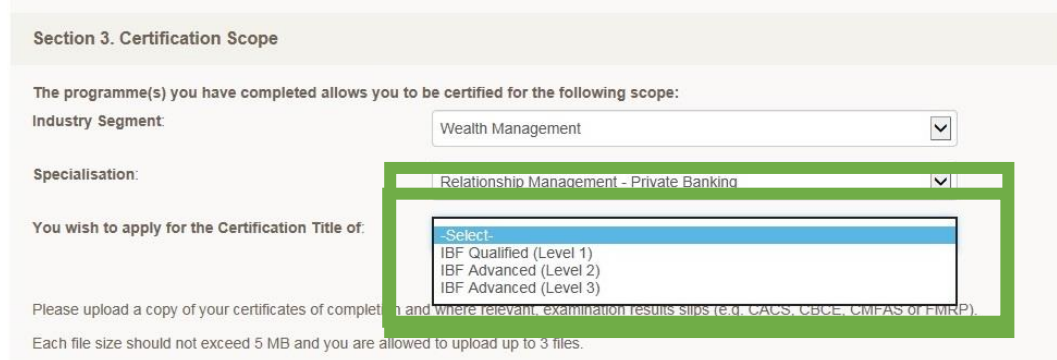
Training Provider	Programme Title	Programme Level	Action
-------------------	-----------------	-----------------	--------

Completion Date:

Section 3:

3.5. Choosing the **Certification Scope**

Select the certification scope from the drop down box in the screenshot.



Section 3. Certification Scope

The programme(s) you have completed allows you to be certified for the following scope:

Industry Segment:

Specialisation:
-Select-
IBF Qualified (Level 1)
IBF Advanced (Level 2)
IBF Advanced (Level 3)

You wish to apply for the Certification Title of:

Please upload a copy of your certificates of completion and where relevant, examination results slips (e.g. CACS, CBCE, CIMFAS or FMRP).
Each file size should not exceed 5 MB and you are allowed to upload up to 3 files.

3.6. Upload **Supporting Documents** / Indicate Years of Experience

Click on “Choose File” button to upload supporting documents. This is a compulsory step.

Section 4:

3.7. Indicate down the years of experience that you have as follows:

Certification User Guide for Individual Login

1) Total Financial Industry Experience

2) Years of relevant experience in Industry Segment

Each file size should not exceed 5 MB and you are allowed to upload up to 3 files.

Supporting Documents:

Choose File No file chosen

Choose File No file chosen

Choose File No file chosen

Section 4. Relevant Industry Experience

Please indicate your years of financial industry and segment-relevant experience.

Kindly note that a minimum of
(i) **3 years** of segment-relevant experience is required for "IBF Advanced (Level 2)" certification; and
(ii) **8 years** of segment-relevant experience is required for "IBF Advanced (Level 3)" certification.
There is no experience required for "IBF Qualified (Level 1)" certification.

Total Years of Financial Industry Experience:

Years of relevant experience in Industry Segment:

Resume / CV: Choose File No file chosen

Section 5:

3.8. Declaration

Indicate on the tick boxes to complete the application and click on **Next >> Confirm Application** to submit. You may also save your application as a draft (**Save as Draft**) to continue at a later stage.

Section 5. Declarations

I have read and am aware of IBF's [Personal Data Protection Policy](#).

I have read and agree with the [Terms and Conditions](#) of being an IBF-Certified Individual. This includes my agreement to observe the Code of Ethics and Standards of Professional Conduct and to commit to a Continuous Professional Development (CPD) required.

I hereby also affirm that the information given above is true and complete. I understand that any false or misleading information provided in this application may result in the withdrawal of IBF Certification status if it is found out subsequent to the approval of the application.

[Cancel](#)

Save as Draft

Next » Confirm Application

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The screenshot shows the IBF Singapore website interface. At the top, there is a navigation bar with the IBF Singapore logo and three menu items: 'My Dashboard', 'Examinations', and 'Certification'. The 'Certification' menu is active. Below the navigation bar, there are links for 'View Submitted Certifications' and 'Apply for Certification'. The main content area is titled 'Step 2: Confirm Application' and features a progress bar with four steps: 1. Application Form, 2. Confirm Application (highlighted), 3. Payment, and 4. Completion. Below the progress bar, there is a section titled 'Section 1 . Applicant Details' containing a table of user information.

Section 1 . Applicant Details	
Salutation:	Mr
Full Name (as stated in NRIC / FIN Passport):	Cheng Tai Keng
ID Type:	Singapore Citizen
NRIC / Fin No.:	S0597095D
Nationality:	Singapore
Organisation:	IBF
Designation:	Manager
Office Email:	345@ibf.org.sg
Personal Email:	62353535@yahoo.com
Office Number:	62208566
Mobile Number:	62208566

3.9. You will then proceed to confirm the application

1. Application Form

2. Confirm Application

3. Payment (**Kindly note that there will be no Certification Fee Charged until further notice**)

4. Completion

Details of the application which you have indicated will be displayed for you to confirm before proceeding to the next step. Once confirmed, click on **Next >> Make Payment** to proceed.

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Section 4 . Relevant Industry Experience

Total Years of Financial Industry Experience:	1
Years of relevant experience in Industry Segment:	1
Resume / CV:	None

[Back](#) [Cancel](#)

NEXT >> Make Payment

3.10. You will then proceed to make payment

1. Application Form
2. Confirm Application
3. Payment (**Kindly note that there will be no Certification Fee Charged until further notice**)
4. Completion

Do note that the certification fees are currently waived. Hence, there would be no course fees charged for the certification application. The fee reflected will be indicated as \$0.00 in the invoice. Once the payment is made, an invoice will be generated.

Office Email:	345@ibf.org.sg								
Personal Email:	62353535@yahoo.com								
Office Number:	62208566								
Mobile Number:	62208566								
Address									
Please note that all hard-copy correspondences and will be delivered to this address.									
Building Name:	MAS Building	Building No.:	10						
Street Name:	Shenton Way	Unit No.:	13-07						
Country:	Singapore	Postal Code:	079117						
Section 2 . Programme Details									
<table border="1"><thead><tr><th>Training Provider</th><th>Programme Title</th><th>Programme Level</th></tr></thead><tbody><tr><td>Wealth Management Institute Pte Ltd</td><td>WMI Private Banking Wealth Management Programme (IBF Level 1)</td><td>Level 1</td></tr></tbody></table>				Training Provider	Programme Title	Programme Level	Wealth Management Institute Pte Ltd	WMI Private Banking Wealth Management Programme (IBF Level 1)	Level 1
Training Provider	Programme Title	Programme Level							
Wealth Management Institute Pte Ltd	WMI Private Banking Wealth Management Programme (IBF Level 1)	Level 1							
Completion Date:	27 January 2016								
Section 3 . Certification Scope									
Industry Segment:	Wealth Management								
Specialisation:	Relationship Management - Private Banking								
Supporting Documents:	cert_docx								
You wish to apply for the Certification Title of:	IBF Qualified (Level 1)								

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View Submitted Certifications | Apply for Certification |

Step 3: Payment

1 Application Form 2 Confirm Application 3 **Payment** 4 Completion



Payment Summary

Items	Fee
Certification Application Fee Segment: Wealth Management Specialisation: Relationship Management - Private Banking Certification Title: IBF Qualified (Level 1)	S\$ 0.00
Total amount (before GST)	S\$ 0.00
GST (7%)	S\$ 0.00
Total amount payable (inc. GST)	S\$ 0.00

Payment Method

Please make payment by Credit Card

Credit Card

Appendix 1 – Level 2 & Level 3 Certification Applications

4.1 For Level 2 and 3 Certification applications, the following criteria is required.

Level 2

Applicants must possess minimum **3 years** of relevant experience or equivalent in the industry segment being applied for.

Level 3

Applicants must possess minimum **8 years** of relevant experience or equivalent in the industry segment being applied for.

Instead of the **Experience Requirement Form**, Kindly upload the **“IBF Certification Application Form”** for the financial planning segment

Section 5 will appear for Certification Applications made at either Level 2 or Level 3.

Section 5. Endorsement Form


Please [download](#) a copy of the endorsement form for your HR endorsement.

Endorsement Form: *

Choose File No file chosen

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Sample **IBF Certification Application Form** for financial planning segment

Confidential	
	IBF CERTIFICATION APPLICATION FORM <i>(For Financial Planning segment only)</i>
Please select your current designation: <input type="checkbox"/> AFP Holder; <input type="checkbox"/> CFP Holder ; <input type="checkbox"/> ChFC/S Holder	Date of Completion (DD/MM/YYYY): <input type="text"/>
Section 1: Applicant's Particulars	
Salutation:	<input type="checkbox"/> Mr <input type="checkbox"/> Ms <input type="checkbox"/> Mrs <input type="checkbox"/> Mdm <input type="checkbox"/> Dr
ID Type:	<input type="checkbox"/> Singapore Citizen <input type="checkbox"/> Singapore Permanent Resident <input type="checkbox"/> FIN <input type="checkbox"/> Passport
ID Number:	<input type="text"/>
Full Name (as per NRIC):	<input type="text"/>
Nationality:	<input type="text"/>
Representative Notification Framework (RNF) Number:	<input type="text"/>
Section 2: IBF Certification Requirements	
To apply for IBF Certification (Financial Planning), I am aware that I need to fulfil the following certification criteria:	
<input type="checkbox"/> I hereby declare that I have fulfilled the Core CPD hours which comprise of (i) 4 training hours in Ethics; and (ii) 8 training hours in Rules and Regulations, for the current calendar year.	
Only applicable for CFP / ChFC/S holders	
<input type="checkbox"/> I hereby declare that I am currently working in a Financial Planning role, and have 3 years of direct experience in Financial Planning.	
Section 3: Declaration	
<input type="checkbox"/> I have read and am aware of IBF's Personal Data Protection Policy . This includes my agreement for my personal data to be shared across the training providers to IBF	

Appendix 2 – Returned Applications

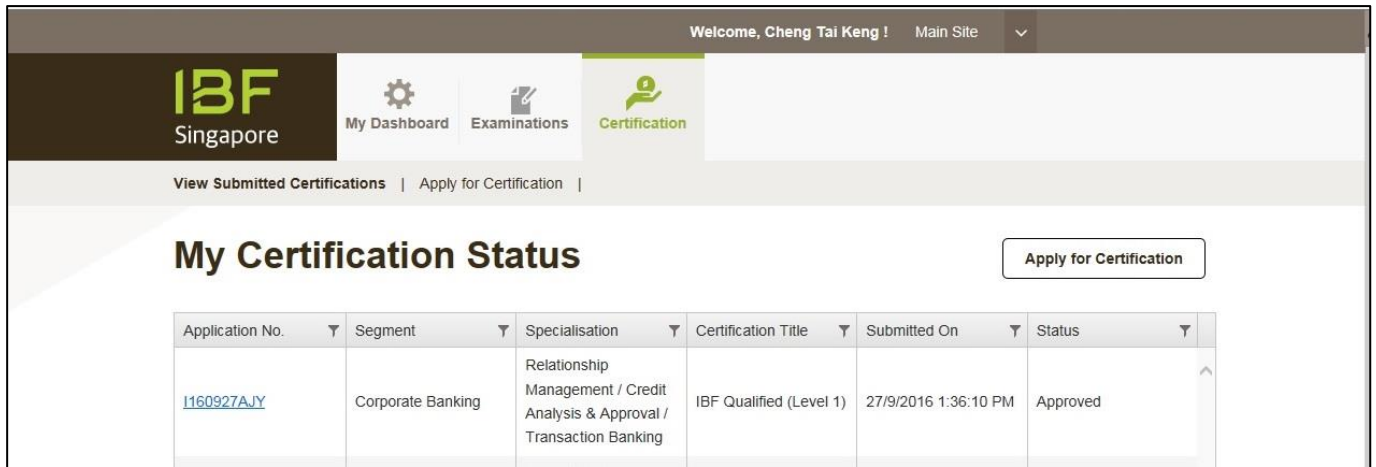
Should IBF require further clarifications on the Certification Application, an email will be sent to you.

Please refer to the screenshot for a sample email which you will receive.

You will be required to login to IBF Portal to perform the re-submission. The reason for the return will also be shown when you re-login to access the application. Proceed to section 5 to make the necessary amendments and resubmit for IBF to re-process the application.

Appendix 3 – Approved applications

4.1 You will be notified once IBF approves the application. An email will be sent upon approval. The portal status of the application will be changed to approve as per the screenshot below.



The screenshot shows the IBF Singapore portal interface. At the top, there is a navigation bar with the IBF Singapore logo on the left and three menu items: 'My Dashboard', 'Examinations', and 'Certification'. The 'Certification' menu is highlighted. Below the navigation bar, there are two links: 'View Submitted Certifications' and 'Apply for Certification'. The main content area is titled 'My Certification Status' and includes a button labeled 'Apply for Certification'. Below this is a table with the following data:

Application No.	Segment	Specialisation	Certification Title	Submitted On	Status
1160927AJY	Corporate Banking	Relationship Management / Credit Analysis & Approval / Transaction Banking	IBF Qualified (Level 1)	27/9/2016 1:36:10 PM	Approved

Please do not hesitate to contact us at certification@ibf.org.sg or +65 6220 8566 if you require any assistance.

Thank you.

