

TAKE ADVANTAGE OF THE EXEMPTION PERIOD FOR IBF CERTIFICATION FOR FINANCIAL PLANNERS BEFORE 1 JAN 2018

PATHWAY & ELIGIBILITY BEFORE 31 DEC 2017

(Programmes completed before 1 Jan 2017)

Associate Financial Planner Programme Pathway (AFP) to IBF Certificate in Financial Planning Level 1



Associate Financial
Planner Programme
completed before
1 Jan 2017



CPD Bridging Programme
"Client On-boarding
and Advisory"
(For AFP who passed their Mod
1 prior to C1 2016 Exam)



Core FA CPD
(4 hrs ethics +
8 hrs R & R)



IBF Certificate in
Financial Planning Level 1

Certified Financial Planner Programme (CFP) to IBF Certificate in Financial Planning Level 2



Certified Financial
Planner Programme
Completed before 1
Jan 2017



CPD Bridging Programme
"Business Succession Planning"
(For CFP who passed their
Mod 2 prior to C1 2016 Exam)



Core FA CPD
(4 hrs ethics +
8 hrs R & R)



3 years of
FA experience



IBF Certificate in
Financial Planning Level 2

Certified Financial Chartered Financial Consultant / Singapore (ChFC) to IBF Certificate in Financial Planning Level 2



Chartered Financial
Consultant / Singapore
Completed before 1 Jan 2017



CPD Bridging Programme
"Business Succession Planning"
(For CFP who passed their
Mod 2 prior to C1 2016 Exam)



3 years of
FA experience



IBF Certificate in
Financial Planning Level 2

PATHWAY & ELIGIBILITY AFTER 31 DEC 2017

Associate Financial Planner Programme Pathway (AFP) to IBF Certificate in Financial Planning Level 1



Associate Financial Planner Programme completed before 1 Jan 2017



CMFAS (5,8 & 8A) or (5,9, 9A & HI)



IBF Certificate in Financial Planning Level 1

Certified Financial Planner Programme (CFP) to IBF Certificate in Financial Planning Level 2



Certified Financial Planner Programme Completed before 1 Jan 2017



CMFAS (5, 8A, 9A & HI)
*CFP holder will be exemption on CMFAS 8 & 9



3 years of FA experience



IBF Certificate in Financial Planning Level 2

Certified Financial Chartered Financial Consultant / Singapore (ChFC) to IBF Certificate in Financial Planning Level 2



Chartered Financial Consultant / Singapore Completed before 1 Jan 2017



CMFAS (5, 8A, 9A & HI)
*ChFC holder will be exemption on CMFAS 8 &



3 years of FA experience



IBF Certificate in Financial Planning Level 2

START TAKING ADVANTAGE NOW!