

IBF CERTIFICATION ARRANGEMENT FOR FINANCIAL PLANNERS



Login in to IBF Portal (bit.ly/ibfportal) to sign up for the IBF Certification

PATHWAY & ELIGIBILITY BEFORE 1 JAN 2018

For Programmes completed *before 1 Jan 2016*

Associate Financial Planner Programme Pathway (AFP)

➔ IBF Certificate in Financial Planning Level 1



Associate Financial Planner Programme completed before 1 Jan 2016



CPD Programme "Client On-boarding and Advisory"



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



IBF Certificate in Financial Planning Level 1

Certified Financial Planner Programme (CFP)

➔ IBF Certificate in Financial Planning Level 2/3



Certified Financial Planner Programme Completed before 1 Jan 2016



CPD Programme "Business Succession Planning"



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



3 years of FA experience



IBF Certificate in Financial Planning Level 2/3

Certified Financial Chartered Financial Consultant / Singapore (ChFC)

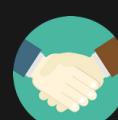
➔ IBF Certificate in Financial Planning Level 2/3



Chartered Financial Consultant / Singapore Completed before 1 Jan 2016



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



3 years of FA experience



IBF Certificate in Financial Planning Level 2/3

PATHWAY & ELIGIBILITY BEFORE 1 JAN 2018

For Programmes *completed in 2016 and 2017*

Associate Financial Planner Programme Pathway (AFP)

➔ IBF Certificate in Financial Planning Level 1



Associate Financial Planner Programme completed in 2016 or 2017

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

IBF Certificate in Financial Planning Level 1

Certified Financial Planner Programme (CFP)

➔ IBF Certificate in Financial Planning Level 2/3



Certified Financial Planner Programme completed in 2016 or 2017

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

3 years of FA experience

IBF Certificate in Financial Planning Level 2/3

Certified Financial Chartered Financial Consultant / Singapore (ChFC)

➔ IBF Certificate in Financial Planning Level 2/3



Chartered Financial Consultant / Singapore completed in 2016 or 2017

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

3 years of FA experience

IBF Certificate in Financial Planning Level 2/3

PATHWAY & ELIGIBILITY FROM 1 JAN 2018

Associate Financial Planner Programme Pathway (AFP)

➔ IBF Certificate in Financial Planning Level 1



Associate
Financial Planner
Programme



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



IBF Certificate in
Financial Planning Level 1

Certified Financial Planner Programme (CFP)

➔ IBF Certificate in Financial Planning Level 2/3



Certified
Financial Planner
Programme



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



3 years of
FA experience



IBF Certificate in
Financial Planning
Level 2/3

Certified Financial Chartered Financial Consultant / Singapore (ChFC)

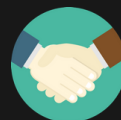
➔ IBF Certificate in Financial Planning Level 2/3



Chartered Financial
Consultant / Singapore



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



3 years of
FA experience



IBF Certificate in
Financial Planning
Level 2/3

* Refer to the Financial Advisers Act on www.mas.gov.sg for any latest updates to the requirements.

APPLY TODAY!

To find out more visit www.ibf.org.sg