

Application Form

Section 1 - Personal Details (all fields are mandatory)

| | | |
|--|--------------------|--|
| Title: <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other _____ | | Date of birth (dd/mm/yyyy): |
| Full Name (as reflected in NRIC/FIN): | | |
| NRIC/FIN Number: | | |
| Email: | Telephone (m): +65 | |
| Nationality: <input type="checkbox"/> Singaporean <input type="checkbox"/> Singaporean PR <input type="checkbox"/> Other (please specify) _____ | | |
| Highest Education Level: <input type="checkbox"/> PhD <input type="checkbox"/> Master's <input type="checkbox"/> Degree <input type="checkbox"/> Diploma <input type="checkbox"/> A Levels <input type="checkbox"/> O Levels <input type="checkbox"/> Others _____ | | |
| Permanent Residential Address | | Primary Mailing Address: <input type="checkbox"/> Same as residential address |
| House/Block No: | House/Block No: | |
| Unit No: | Unit No: | |
| Building: | Building: | |
| Street Name: | Street Name: | |
| Postcode: | Postcode: | |
| Country: | Country: | |

Section 2 - Professional Details

| | |
|--|-------------|
| Job Title: | |
| Professional Certifications: <input type="checkbox"/> ChFC <input type="checkbox"/> FChFP <input type="checkbox"/> AEPP <input type="checkbox"/> CFP <input type="checkbox"/> CLU <input type="checkbox"/> CFA <input type="checkbox"/> CPA <input type="checkbox"/> TEP <input type="checkbox"/> AFC <input type="checkbox"/> Other _____ | |
| Company Name: | |
| MAS Representative Number: | Agent Code: |
| Company Address: | |
| Agency Name (if applicable): | |
| A number of years in the financial services/WM industry: | |

Section 3 - Company Sponsored Details (for Company Sponsored participants)

| | |
|--------------------------|--------------|
| Company Contact Person: | |
| Company Name: | |
| Billing Address: | Company UEN: |
| Title of Contact Person: | |
| Department: | Telephone: |
| Contact Email Address: | |

Note: Eligible Companies include Singapore-based Financial Institutions (licensed or exempt from licensing by MAS) and FinTech firms certified by Singapore FinTech Association (SFA). Please refer to the certification validity period in the certification issued by SFA to determine the eligibility of FinTech firms. The course commencement date should be within the SFA certification validity period.

Section 4

Select individual subjects and nominate when you wish to commence.

Select all 6 subjects to complete the HNW Certification programme.

| Individual Subjects | SP1 2022 10 Jan | SP2 2022 7 Mar | SP3 2022 2 May | SP4 2022 4 July | SP5 2022 29 Aug | SP6 2022 31 Oct |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| <i>Subject 1</i> Private wealth and family office: environment, trends and client focus | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Subject 2</i> Business structuring and tax considerations (including beyond advice) | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Subject 3</i> Estate planning strategies for HNW individuals and family offices | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Subject 4</i> Insurance solutions and asset protection for HNW clients | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Subject 5</i> Private wealth investment strategies and portfolio construction | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <i>Subject 6</i> Applied business strategy for HNW individuals and family offices | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Note: Subjects should be taken in sequence and a maximum of 2 subjects may be nominated per study period. You must nominate a study period for Subject 1. If study periods are not nominated for subjects 2-6, subject enrolment will default to 1 subject per subsequent study period. If you select to study a subject in a future study period, we will contact you to confirm your enrolment 30 days prior to the study period commencement date. Enrolments will close 7 business days before the study period commencement date. For more information on study dates, visit www.hnwcertification.com.

Programme commencing 1 January - 30 June 2022. Fees after Enhanced IBF-STs Funding

| Fees per subject | Self-sponsored | | Company-Sponsored | |
|-------------------------------|---|--|--|--|
| | BF-STs 80% funding <40 years of age ¹ | IBF-STs 90% funding ≥40 years of age ² | IBF-STs 80% funding <40 years of age ¹ | IBF-STs 90% funding ≥40 years of age ² |
| Registration Fee ³ | \$300.00 | \$300.00 | \$300.00 | \$300.00 |
| Tuition Fee | \$1,200.00 | \$1,200.00 | \$1,200.00 | \$1,200.00 |
| IBF Funding | (\$960.00) | (\$1,080.00) | (\$897.20) | (\$1,009.35) |
| Nett Tuition Fee | \$240.00 | \$120.00 | \$302.80 | \$190.65 |

¹ Singapore Citizens and all Permanent Residents <40 years of age, physically based in Singapore.

² Singapore Citizens ≥40 years of age, physically based in Singapore.

³ A one-time, non-refundable, non-subsidised Registration Fee of \$300 is payable at the commencement of the programme.

Prices are inclusive of 7% GST.

Fees above effective for enrolments commencing 1 January - 30 June 2022.

The Training Allowance Grant (TAG) is available to eligible companies for training programmes commencing before 30 June 2022 and completed no later than 30 September 2022. The TAG for HNW Certification subjects is S\$10/hour of eligible training and assessment hours. For more information, please visit ibf.org.sg.

Section 5 — Eligibility Criteria for IBF Funding Support

IBF Standards Training Scheme (IBF-STTS) - Funding Eligibility:

To be eligible for the IBF-STTS Funding you/candidates must:

- Be a Singaporean/PR (Permanent Resident) physically based in Singapore
- Pass all exams/assignments/assessments
- Meet the minimum 75% attendance requirements

For more information, visit www.ibf.org.sg/programmes/Pages/IBF-STTS.aspx.

IFPAS reserves the right to take all reasonable steps to collect a sum equivalent to the course fee subsidy (secured from IBF) and IBF credit from the relevant student/trainee or company who secures IBF funding and/or IBF Credit, in the event that the relevant student/trainee or company:

- a. drops out halfway through the course;
- b. did not pass the assessment for the course;
- c. did not meet the attendance requirement; or
- d. any other factors resulting in failure to meet funding eligibility.

Qualifying expenses incurred on the training of both executive and non-executive staff, as well as staff employed on a short-term basis of less than one year (inclusive of contract staff and interns), will be eligible for funding under IBF-STTS and FTS, subject to meeting the conditions under these schemes. Licensed agents or representatives (i.e. financial advisors, traders, insurance agents, remisiers) representing a legal principal entity may be included in the claims of that principal entity.

I understand that failure to fulfil a minimum of 75% attendance for the course registered, absenteeism, any wilful breach of terms and conditions as stipulated in the admission process or wrongful declaration on my part will render this application null and void and I will be liable to pay the full course fee which I am enrolled.

I am applying for the HNW Certification under the IBF Standards Training Scheme (IBF-STTS):

I am Self Sponsored Company Sponsored No Funding

| Self-Sponsored Participants | Company-Sponsored Participants |
|---|--------------------------------|
| Signature: | Company Authorised Signatory: |
| Name: | Name of Authorised Signatory: |
| Date: | Company Stamp and Date: |
| <input type="checkbox"/> I confirm and accept the above eligibility criteria* | |

Section 6 – Admission Criteria and Declaration

Terms & Conditions

General

- Enrolment of courses and/or other fees relating to the programme will only be recognised upon receipt of payment.
- All course fees quoted are inclusive of GST unless otherwise stated and must be paid in full.
- IFPAS reserves the right to make changes to the course, date, time and cancel the course due to unforeseen circumstances.
- Tuition fees are based on the prevailing IBF-STs Enhanced Support (to 30 June 2022). IFPAS reserves the right to alter the tuition fees due to changes in the IBF funding available.

Course withdrawal and refunds

- Withdrawals from the course are accepted up to 3 business days before the commencement of the first study period in which the subject is enrolled. Request for withdrawals must be made in writing an email to education@ifpas.org.sg.
- After receiving the notice of withdrawal in writing, IFPAS will refund 100% of the tuition fee paid within 1 month.
- The nett tuition fee is non-refundable after the commencement of the study period.
- The registration fee is non-refundable.

IFPAS reserves the right to take all reasonable steps to collect a sum equivalent to the course subject fee (secured from the IBF) if the relevant student:

- Does not pass the assessment for the subject;
- Does not meet the attendance requirement of the subject;
- Fails to complete the final examination within the stipulated timeframe; or
- Any other factor resulting in failure to meet funding eligibility.

Deferral of study period

- Students can choose from the six study periods per annum. A request for transfer of enrolment to the next study period is required to be submitted to IFPAS no later than 7 days before the commencement of the enrolled study period to avoid penalty.
- Deferment requests received by IFPAS 6 days or less before the commencement of the study period will incur an administrative charge of \$53.50 (inclusive of GST).
- Should IFPAS approve the transfer request to the next study period, the student is required to attend the course date agreed by both IFPAS and the student. A further change of course date after approval of request will be subjected to a penalty of \$107 (inclusive of GST).
- For special consideration, students may request to defer study period up to 7 days after the commencement of the study period by applying in writing with supporting documents. Re-enrolment must be made within 6 months into another study period.
- Students have a maximum timeframe of 3 years to complete the six subjects of the course.

Confidentiality and Personal Data Protection Consent Clause

This information you have provided will be treated with the strictest confidentiality and in accordance to the IFPAS Data Protection Policy: www.ifpas.org.sg/PDPA.PDF and Kaplan Professional Privacy Policy: www.kp.edu.au/privacy-policy. By signing this form, you give consent to our use of your information.

I authorise IFPAS to release my personal information to relevant institutes/agencies including, but not limited to Kaplan Education Pty Ltd (ABN 54 089 002 371) and Kaplan Higher Education Pty Ltd (ABN 85 124 217 670), collectively referred to as Kaplan Professional and the Institute of Banking and Finance Singapore (IBF Singapore) in (a) matters relating to my course of study or funding; (b) regulatory and/or compliance (external and internal) requirements as dictated by the aforementioned bodies' annual audit purposes.

I declare that I have read and fully understood the terms and conditions stated within this form and that the information I have provided is accurate of the best to my knowledge.

I confirm and accept the above eligible criteria*

Section 7 – Payment Methods

Credit Card: Mastercard or Visa only (please ensure credit cards have at least 6 months' validity)

Card No:

Expiry Date:

Signature:

For self-sponsored candidates, payment must be made 7 business days before the start of the study period.

For company-sponsored candidates, IFPAS will liaise with the respective companies for payment arrangements.

Checklist

- Selected subject(s)
- Selected study period(s)
- Attached a coloured copy of NRIC (front and back)
- Eligibility criteria declaration
- Admission criteria declaration
- Payment method
- I confirm and accept the above terms and conditions of admission***

Signature:

Date:

Submit Application Form

Please send the completed application form, together with a coloured copy of NRIC and supporting documentation (all to be submitted in PDF format) to:

EMAIL education@ifpas.org.sg