Singapore College of Insurance

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Chartered Financial Consultant®/ Singapore (ChFC®/S) – Self Study

Diploma in Personal Financial Planning (DPFP) – Self Study

Chartered Financial Consultant®/ Singapore (ChFC®/S)

To provide your clients with the best possible service and advance your career in the process, you need a strong, foundational knowledge focused on modern realities and challenges. The Chartered Financial Consultant®/ Singapore (ChFC®/S) designation offers just that.

Designed for immediate, real-world application, the financial planning strategies taught in the nine-course ChFC®/S programme equips you with the insight and skills to excel in financial planning.

Stand out in the competitive financial industry by earning the ChFC®/S designation.

Diploma in Personal Financial Planning (DPFP) – Self Study

Offered on a self-study basis, the Diploma in Personal Financial Planning (DPFP) programme is developed and awarded by the Singapore College of Insurance (SCI) as a professional qualification for insurance industry practitioners.

The DPFP provides financial advisory professionals with the requisite knowledge and skills of the processes, tools and concepts of financial planning, tax and investment planning. It also serves as an interim qualification and it creates a seamless education progression pathway for SCI's candidates to achieve the prestigious professional designation of Chartered Financial Consultant® Singapore (ChFC®/S) through exemptions.

Self-Study Option

We highly encourage candidates to go through the Training & Assessment route. For more information, please refer to the Training & Assessment brochure here.

Registrations will close two working days before each examination date.
For ChFC08 Opening and Closing Registration Dates, please see Table 6.
ChFC09 Opening and Closing Registration Dates follow those of ChFC08.

Month	Module	Opening Registration Date
January	ChFC01/DPFP01 - ChFC07	-
February	ChFC01/DPFP01 - ChFC07	-
March	ChFC01/DPFP01 - ChFC07	-
April	ChFC01/DPFP01 - ChFC07	2 February 2026
May	ChFC01/DPFP01 - ChFC07	2 March 2026
June	ChFC01/DPFP01 - ChFC07	1 April 2026
July	ChFC01/DPFP01 - ChFC07	4 May 2026
August	ChFC01/DPFP01 - ChFC07	2 June 2026
September	ChFC01/DPFP01 - ChFC07	1 July 2026
October	ChFC01/DPFP01 - ChFC07	3 August 2026
November	ChFC01/DPFP01 - ChFC07	1 September 2026
November	ChFC01/DPFP01 - ChFC07	1 October 2026

Progression Pathway

Chartered Financial Consultant® / Singapore (ChFC®/S)

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ChFC01/DPFP01	Financial Planning: Process and Environment
ChFC02/DPFP02	Risk Management, Insurance and Retirement Planning
ChFC03/DPFP03	Tax, Estate Planning and Legal Aspects of Financial Planning
ChFC04/DPFP04	Investment Planning
ChFC05/DPFP05	Personal Financial Plan Construction
ChFC06	Planning for Business Owners and Professionals
ChFC07	Wealth Management and Financial Planning
ChFC08	Financial Planning Applications
ChFC09	Ethics for the Financial Services Professional

Diploma in Personal Financial Planning (DPFP)

This is a 36-month SWDA-Registered Programme (part-time).

ChFC01/DPFP01	Financial Planning: Process and Environment
ChFC02/DPFP02	Risk Management, Insurance and Retirement Planning
ChFC03/DPFP03	Tax, Estate Planning and Legal Aspects of Financial Planning
ChFC04/DPFP04	Investment Planning
ChFC05/DPFP05	Personal Financial Plan Construction
DPFP05E	Skills and Ethics for Financial Advisers

Examination Fees

Note: A one-time non-refundable registration fee of S$50.00 (with GST at prevailing rate) is applicable at the time of first admission into the programme. The registration fee is not funded.

Module (Without Funding)

ChFC01/DPFP01 - ChFC05/DPFP05
ChFC06-ChFC07

Fee Per Module (inclusive of GST)	
First Attempt S$392.40	Retaker Fee S$196.20

DPFP05E (Online Learning & Examination)

Fee Per Module (inclusive of GST)	
First Attempt S$109.00	Retaker Fee S$109.00

ChFC09 (Online Learning & Examination)

Fee Per Module (inclusive of GST)	
First Attempt S$109.00	Retaker Fee S$54.50

ChFC08
14-hour Tutorial (Online)
1-hour Practicum Assessment (Online)
3-hour Case Study Written Assessment (Onsite)

Fee Per Module (inclusive of GST)	
First Attempt S$708.50	Retaker Fee S$163.50 (Tutorial)
	Retaker Fee S$163.50 (Practicum Assessment)
	Retaker Fee S$81.75 (Case Study Written Assessment)

Module (With Funding)

ChFC01/DPFP01 - ChFC05/DPFP05
ChFC06-ChFC07

Fee Per Module (inclusive of GST)	Clawback Amount Per Module	Retake Fee Per Module
Singapore Citizens (40 years and above) S$140.40	70% of module fee S$252.00	S$196.20
Singapore Citizens (Under 40 years and Permanent Residents) S$212.40	50% of module fee S$180.00	S$196.20

DPFP05E (Online Learning & Examination)

Fee Per Module (inclusive of GST)	Clawback Amount Per Module	Retake Fee Per Module
Singapore Citizens (40 years and above) S$39.00	70% of module fee S$70.00	S$109.00
Singapore Citizens (Under 40 years and Permanent Residents) S$59.00	50% of module fee S$50.00	S$109.00

ChFC09 (Online Learning & Examination)

Fee Per Module (inclusive of GST)	Clawback Amount Per Module	Retake Fee Per Module
Singapore Citizens (40 years and above) S$39.00	70% of module fee S$70.00	S$109.00
Singapore Citizens (Under 40 years and Permanent Residents) S$59.00	50% of module fee S$50.00	S$54.50

ChFC08
14-hour Tutorial (Online)
1-hour Practicum Assessment (Online)
3-hour Case Study Written Assessment (Onsite)

Fee Per Module (inclusive of GST)	**Clawback Amount** Per Module	**Retake Fee** Per Module
Singapore Citizens (40 years and above) S$253.50	70% of module fee S$455.00	Retaker Fee S$163.50 (Tutorial)
		Retaker Fee S$163.50 (Practicum Assessment)
Singapore Citizens (Under 40 years and Permanent Residents) S$383.50	50% of module fee S$325.00	Retaker Fee S$81.75 (Case Study Written Assessment)

Payment of Examination Fees

Payment must be made at the time of registering for the examination(s) at the SCI website via credit card. SkillsFuture Credit is not applicable for all modules under the DPFP/ChFC®/S Programmes on the Self Study Route currently.

Funding

Only for first examination attempt

- Funded Under IBF Standards Training Scheme (IBF-STS)

Only Singapore Citizens or Singapore Permanent Residents who are physically based in Singapore are eligible for funding.

70% course fee subsidies for Singapore Citizens aged 40 and above:

- Course to commence with effect from 1 January 2023 and candidates to fulfil all the course requirements as well as pass all the examinations/assessments no later than 120 calendar days from the respective course end date as stipulated by the IBF funding policy.
- Assessment-only course to commence with effect from 1 January 2023 and candidates to pass the examination/assessment no later than 120 calendar days from the registered examination date as stipulated by the IBF funding policy.

50% course fee subsidies for Singapore Citizens aged below 40 and all Singapore Permanent Residents:

- Course to commence with effect from 1 January 2023 and candidates to fulfil all the course requirements as well as pass all the examinations/assessments no later than 120 calendar days from the respective course end date as stipulated by the IBF funding policy.
- Assessment-only course to commence with effect from 1 January 2023 and candidates to pass the examination/assessment no later than 120 calendar days from the registered examination date as stipulated by the IBF funding policy.

Important Note

- For self-sponsored trainees, GST funding support has been removed with effect from 3 October 2022. In other words, self-sponsored trainees will have to pay the GST component in addition to the course fee for Course/Assessment-only course that commence from 3 October 2022.
- For candidate who opts for net fee funding, SCI reserves the right to claw back the full amount from the candidate if he/she does not successfully complete the programme within the stipulated deadline.

Please refer to the IBF website for more details.

Union Training Assistance Programme (UTAP)

Funding support for ChFC/S module (except for DPFP05E and ChFC09) is available for eligible NTUC members. For details, please refer here.

Advisory Note, Student Contract & Withdrawal Policy

For ChFC01/DPFP01 – ChFC05/DPFP05 and DPFP05E

All candidates whether self-sponsored or company-sponsored are required to sign an Advisory Note and a Student Contract with the SCI before registering for the DPFP modules. The SCI offers a Cooling-Off Period of 10 calendar days from the date of signing the Student Contract. Should a candidate decide to withdraw from the DPFP programme within the Cooling-Off Period, he/she must notify the SCI by way of electronic mail (email). A full refund of Net Fee paid including one-time registration fee of S$50.00 (inclusive of GST at prevailing rate) paid by the candidate, if any, will be made by the SCI to the candidate within 7 working days from the date of withdrawal in such instance. The date of withdrawal must fall within the 10 calendar days from the contract signed date by both parties. No withdrawal is allowed after the cooling-off period for whatsoever reasons. Candidates are advised to check the course/examination details, including the exemption policy, before submission.

To sign the Advisory Note and Student Contract, candidates will contact the SCI via email at talk2us@scidomain.org.sg or call the SCI officer during office hours at 62212336 to request for the Advisory Note and Student Contract to be sent to them via Adobe Sign. They are also required to state the preferred intakes for these funded modules as deadlines to pass these modules to be eligible for the IBF-STS funding will be counted from the examination dates of those intakes that candidates have selected.

Clawback Contract for ChFC06-ChFC09

Candidates who wish to register for ChFC06 to ChFC09 are required to sign the Clawback Contract electronically pertaining to Clawback Provision, Registration Policy, Rescheduling Policy and Refund Policy before the registration can be confirmed.

To sign the Clawback Contract, candidates will contact SCI via email at talk2us@scidomain.org.sg or call the SCI officer during office hours at 62212336 to request the Clawback Contract to be sent to them via Adobe Sign. They are also required to state the preferred examination dates for these funded modules as deadlines to pass these modules to be eligible for the IBF-STS funding will be counted from the examination dates that candidates have selected.

Clawback Provision

The Student Contract and Clawback Contract provide for the Clawback Provision whereby in the event that candidates should fail and/or neglect to pass the examinations or for whatever reason(s) within the specified deadline(s) as stated in Deadline to Pass as stipulated by the IBF funding policy, they will not be entitled or eligible to get funding for part of the fees under the IBF-STS funding scheme. Candidates, thereby, undertake to pay the SCI for the indicated clawback amount invoiced, and will have to settle the payment within 7 working days from the invoice date.

For Self-Study Only (SS)

For the candidate on the Self-Study Only (SS) pathway, the SCI will claw back the necessary module fee, depending on the subsidy granted.

Module	Funding Support	Clawback Amount Per Module
ChFC01/DPFP01 ChFC02/DPFP02 ChFC03/DPFP03 ChFC04/DPFP04 ChFC05/DPFP05 ChFC06 ChFC07	70% of module fee	S$252.00
	50% of module fee	S$180.00
ChFC08	70% of module fee	S$455.00
	50% of module fee	S$325.00
DPFP05E ChFC09	70% of module fee	S$70.00
	50% of module fee	S$50.00

Attendance Requirement

Candidates are also required to scan the QR code(s) presented in the assessment/examination room(s) to meet the funding eligibility requirement for attendance.

Examination Details

Examination / Assessment Format & Structure

ChFC01/DPFP01 Financial Planning: Process and Environment
ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning
ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning
ChFC04/DPFP04 Investment Planning
ChFC06 Planning for Business Owners and Professionals
ChFC07 Wealth Management and Financial Planning

100 Multiple Choice Questions | **2** Hours | Minimum Passing Mark **70** Marks

ChFC05/DPFP05 Personal Financial Plan Construction

50 Multiple Choice Questions (case-based) | **2** Hours | Minimum Passing Mark **35** Marks

DPFP05E Skills and Ethics for Financial Advisers

30 Multiple Choice Questions | **30** Minutes | Minimum Passing Mark **24** Marks

ChFC08 Financial Planning Applications – Practicum Assessment

One-on-one Presentation of Financial Plan to the Assessor | **1** Hour | To be assessed as "Competent"

Examination Details

Examination / Assessment Format & Structure

ChFC08 Financial Planning Applications – Case Study Written Assessment

2 Case Studies (6 Short Essay Questions each)

3 Hours

Minimum Passing Mark **105/150** Marks

ChFC09 Ethics for the Financial Services Professional (Online & Onsite)

30 Multiple Choice Questions

45 Minutes

Minimum Passing Mark **24** Marks

2026 Examination Schedule | January

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass
ChFC01/DPFP01 Financial Planning: Process and Environment		
5 January 2026 12 January 2026 19 January 2026	9.00 a.m. to 11.00 a.m.	5 May 2026 12 May 2026 19 May 2026
ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning		
6 January 2026 13 January 2026 20 January 2026	9.00 a.m. to 11.00 a.m.	6 May 2026 13 May 2026 20 May 2026
ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning		
7 January 2026 14 January 2026 21 January 2026	9.00 a.m. to 11.00 a.m.	7 May 2026 14 May 2026 21 May 2026
ChFC04/DPFP04 Investment Planning		
8 January 2026 15 January 2026 22 January 2026	9.00 a.m. to 11.00 a.m.	8 May 2026 15 May 2026 22 May 2026
ChFC05/DPFP05 Personal Financial Plan Construction		
9 January 2026 16 January 2026 23 January 2026	9.00 a.m. to 11.00 a.m.	9 May 2026 16 May 2026 23 May 2026
DPFP05E Skills and Ethics for Financial Advisers (Retake)		
7 January 2026 14 January 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date
ChFC06 Planning for Business Owners and Professionals		
8 January 2026 15 January 2026 22 January 2026	11.30 a.m. - 1.30 p.m.	8 May 2026 15 May 2026 22 May 2026

Examination Schedule	Examination Time	Deadline to Pass
ChFC07 Wealth Management and Financial Planning		
9 January 2026 16 January 2026 23 January 2026	11.30 a.m. - 1.30 p.m.	9 May 2026 16 May 2026 23 May 2026
ChFC09 Ethics for the Financial Services Professional (Retake)		
7 January 2026 14 January 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | February

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass
ChFC01/DPFP01 Financial Planning: Process and Environment		
2 February 2026 9 February 2026 16 February 2026	9.00 a.m. to 11.00 a.m.	2 June 2026 9 June 2026 16 June 2026
ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning		
3 February 2026 10 February 2026	9.00 a.m. to 11.00 a.m.	3 June 2026 10 June 2026
ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning		
4 February 2026 11 February 2026	9.00 a.m. to 11.00 a.m.	4 June 2026 11 June 2026
ChFC04/DPFP04 Investment Planning		
5 February 2026 12 February 2026 19 February 2026	9.00 a.m. to 11.00 a.m.	5 June 2026 12 June 2026 19 June 2026
ChFC05/DPFP05 Personal Financial Plan Construction		
6 February 2026 13 February 2026 20 February 2026	9.00 a.m. to 11.00 a.m.	6 June 2026 13 June 2026 20 June 2026

DPFP05E Skills and Ethics for Financial Advisers (Retake)

4 February 2026 11 February 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

5 February 2026 12 February 2026 19 February 2026	11.30 a.m. - 1.30 p.m.	5 June 2026 12 June 2026 19 June 2026

ChFC07 Wealth Management and Financial Planning

6 February 2026 13 February 2026 20 February 2026	11.30 a.m. - 1.30 p.m.	6 June 2026 13 June 2026 20 June 2026

ChFC09 Ethics for the Financial Services Professional (Retake)

4 February 2026 11 February 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | March

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

2 March 2026 9 March 2026 16 March 2026	9.00 a.m. to 11.00 a.m.	30 June 2026 7 July 2026 14 July 2026

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

3 March 2026 10 March 2026 17 March 2026	9.00 a.m. to 11.00 a.m.	1 July 2026 8 July 2026 15 July 2026

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

4 March 2026 11 March 2026 18 March 2026	9.00 a.m. to 11.00 a.m.	2 July 2026 9 July 2026 16 July 2026

ChFC04/DPFP04 Investment Planning

5 March 2026 12 March 2026 19 March 2026	9.00 a.m. to 11.00 a.m.	3 July 2026 10 July 2026 17 July 2026

ChFC05/DPFP05 Personal Financial Plan Construction

6 March 2026 13 March 2026 20 March 2026	9.00 a.m. to 11.00 a.m.	4 July 2026 11 July 2026 18 July 2026

DPFP05E Skills and Ethics for Financial Advisers (Retake)

4 March 2026 11 March 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

5 March 2026 12 March 2026 19 March 2026	11.30 a.m. - 1.30 p.m.	3 July 2026 10 July 2026 17 July 2026

ChFC07 Wealth Management and Financial Planning

6 March 2026 13 March 2026 20 March 2026	11.30 a.m. - 1.30 p.m.	4 July 2026 11 July 2026 18 July 2026

ChFC09 Ethics for the Financial Services Professional (Retake)

4 March 2026 11 March 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | April

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

6 April 2026 13 April 2026 20 April 2026	9.00 a.m. to 11.00 a.m.	4 August 2026 11 August 2026 18 August 2026

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

7 April 2026 14 April 2026 21 April 2026	9.00 a.m. to 11.00 a.m.	5 August 2026 12 August 2026 19 August 2026

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

8 April 2026 15 April 2026 22 April 2026	9.00 a.m. to 11.00 a.m.	6 August 2026 13 August 2026 20 August 2026

ChFC04/DPFP04 Investment Planning

9 April 2026 16 April 2026 23 April 2026	9.00 a.m. to 11.00 a.m.	7 August 2026 14 August 2026 21 August 2026

ChFC05/DPFP05 Personal Financial Plan Construction

10 April 2026 17 April 2026 24 April 2026	9.00 a.m. to 11.00 a.m.	8 August 2026 15 August 2026 22 August 2026

DPFP05E Skills and Ethics for Financial Advisers (Retake)

8 April 2026 15 April 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

9 April 2026 16 April 2026 23 April 2026	11.30 a.m. - 1.30 p.m.	7 August 2026 14 August 2026 21 August 2026

ChFC07 Wealth Management and Financial Planning

10 April 2026 17 April 2026 24 April 2026	11.30 a.m. - 1.30 p.m.	8 August 2026 15 August 2026 22 August 2026

ChFC09 Ethics for the Financial Services Professional (Retake)

8 April 2026 15 April 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | May

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass
ChFC01/DPFP01 Financial Planning: Process and Environment		
4 May 2026 11 May 2026 18 May 2026	9.00 a.m. to 11.00 a.m.	1 September 2026 8 September 2026 15 September 2026
ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning		
5 May 2026 12 May 2026 19 May 2026	9.00 a.m. to 11.00 a.m.	2 September 2026 9 September 2026 16 September 2026
ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning		
6 May 2026 13 May 2026 20 May 2026	9.00 a.m. to 11.00 a.m.	3 September 2026 10 September 2026 17 September 2026
ChFC04/DPFP04 Investment Planning		
7 May 2026 14 May 2026 21 May 2026	9.00 a.m. to 11.00 a.m.	4 September 2026 11 September 2026 18 September 2026
ChFC05/DPFP05 Personal Financial Plan Construction		
8 May 2026 15 May 2026 22 May 2026	9.00 a.m. to 11.00 a.m.	5 September 2026 12 September 2026 19 September 2026
DPFP05E Skills and Ethics for Financial Advisers (Retake)		
6 May 2026 13 May 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date
ChFC06 Planning for Business Owners and Professionals		
7 May 2026 14 May 2026 21 May 2026	11.30 a.m. - 1.30 p.m.	4 September 2026 11 September 2026 18 September 2026

ChFC07 Wealth Management and Financial Planning

8 May 2026 15 May 2026 22 May 2026	11.30 a.m. - 1.30 p.m.	5 September 2026 12 September 2026 19 September 2026

ChFC09 Ethics for the Financial Services Professional (Retake)

6 May 2026 13 May 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | June

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

8 June 2026 15 June 2026	9.00 a.m. to 11.00 a.m.	6 October 2026 13 October 2026

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

2 June 2026 9 June 2026 16 June 2026	9.00 a.m. to 11.00 a.m.	30 September 2026 7 October 2026 14 October 2026

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

3 June 2026 10 June 2026 17 June 2026	9.00 a.m. to 11.00 a.m.	1 October 2026 8 October 2026 15 October 2026

ChFC04/DPFP04 Investment Planning

4 June 2026 11 June 2026 18 June 2026	9.00 a.m. to 11.00 a.m.	2 October 2026 9 October 2026 16 October 2026

ChFC05/DPFP05 Personal Financial Plan Construction

5 June 2026 12 June 2026 19 June 2026	9.00 a.m. to 11.00 a.m.	3 October 2026 10 October 2026 17 October 2026

DPFP05E Skills and Ethics for Financial Advisers (Retake)

3 June 2026 10 June 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

4 June 2026 11 June 2026 18 June 2026	11.30 a.m. - 1.30 p.m.	2 October 2026 9 October 2026 16 October 2026

ChFC07 Wealth Management and Financial Planning

5 June 2026 12 June 2026 19 June 2026	11.30 a.m. - 1.30 p.m.	3 October 2026 10 October 2026 17 October 2026

ChFC09 Ethics for the Financial Services Professional (Retake)

3 June 2026 10 June 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | July

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

6 July 2026 13 July 2026 20 July 2026	9.00 a.m. to 11.00 a.m.	3 November 2026 10 November 2026 17 November 2026

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

7 July 2026 14 July 2026 21 July 2026	9.00 a.m. to 11.00 a.m.	4 November 2026 11 November 2026 18 November 2026

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

8 July 2026 15 July 2026 22 July 2026	9.00 a.m. to 11.00 a.m.	5 November 2026 12 November 2026 19 November 2026

ChFC04/DPFP04 Investment Planning

9 July 2026 16 July 2026 23 July 2026	9.00 a.m. to 11.00 a.m.	6 November 2026 13 November 2026 20 November 2026

ChFC05/DPFP05 Personal Financial Plan Construction

10 July 2026 17 July 2026 24 July 2026	9.00 a.m. to 11.00 a.m.	7 November 2026 14 November 2026 21 November 2026

DPFP05E Skills and Ethics for Financial Advisers (Retake)

8 July 2026 15 July 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

9 July 2026 16 July 2026 23 July 2026	11.30 a.m. - 1.30 p.m.	6 November 2026 13 November 2026 20 November 2026

ChFC07 Wealth Management and Financial Planning

10 July 2026 17 July 2026 24 July 2026	11.30 a.m. - 1.30 p.m.	7 November 2026 14 November 2026 21 November 2026

ChFC09 Ethics for the Financial Services Professional (Retake)

8 July 2026 15 July 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | August

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

3 August 2026 17 August 2026	9.00 a.m. to 11.00 a.m.	1 December 2026 15 December 2026

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

4 August 2026 11 August 2026 18 August 2026	9.00 a.m. to 11.00 a.m.	2 December 2026 9 December 2026 16 December 2026

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

5 August 2026 12 August 2026 19 August 2026	9.00 a.m. to 11.00 a.m.	3 December 2026 10 December 2026 17 December 2026

ChFC04/DPFP04 Investment Planning

6 August 2026 13 August 2026 20 August 2026	9.00 a.m. to 11.00 a.m.	4 December 2026 11 December 2026 18 December 2026

ChFC05/DPFP05 Personal Financial Plan Construction

7 August 2026 14 August 2026 21 August 2026	9.00 a.m. to 11.00 a.m.	5 December 2026 12 December 2026 19 December 2026

DPFP05E Skills and Ethics for Financial Advisers (Retake)

5 August 2026 12 August 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

6 August 2026 13 August 2026 20 August 2026	11.30 a.m. - 1.30 p.m.	5 December 2026 11 December 2026 18 December 2026

ChFC07 Wealth Management and Financial Planning

7 August 2026 14 August 2026 21 August 2026	11.30 a.m. - 1.30 p.m.	5 December 2026 12 December 2026 19 December 2026

ChFC09 Ethics for the Financial Services Professional (Retake)

5 August 2026 12 August 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | September

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass
ChFC01/DPFP01 Financial Planning: Process and Environment		
7 September 2026 14 September 2026	9.00 a.m. to 11.00 a.m.	5 January 2027 12 January 2027
ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning		
1 September 2026 8 September 2026 15 September 2026	9.00 a.m. to 11.00 a.m.	30 December 2026 6 January 2027 13 January 2027
ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning		
2 September 2026 9 September 2026 16 September 2026	9.00 a.m. to 11.00 a.m.	31 December 2026 7 January 2027 14 January 2027
ChFC04/DPFP04 Investment Planning		
3 September 2026 10 September 2026 17 September 2026	9.00 a.m. to 11.00 a.m.	1 January 2027 8 January 2027 15 January 2027
ChFC05/DPFP05 Personal Financial Plan Construction		
4 September 2026 11 September 2026 18 September 2026	9.00 a.m. to 11.00 a.m.	2 January 2027 9 January 2027 16 January 2027
DPFP05E Skills and Ethics for Financial Advisers (Retake)		
2 September 2026 9 September 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date
ChFC06 Planning for Business Owners and Professionals		
3 September 2026 10 September 2026 17 September 2026	11.30 a.m. - 1.30 p.m.	1 January 2027 8 January 2027 15 January 2027

ChFC07 Wealth Management and Financial Planning

4 September 2026 11 September 2026 18 September 2026	11.30 a.m. - 1.30 p.m.	2 January 2027 9 January 2027 16 January 2027

ChFC09 Ethics for the Financial Services Professional (Retake)

2 September 2026 9 September 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | October

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

5 October 2026 12 October 2026 19 October 2026	9.00 a.m. to 11.00 a.m.	2 February 2027 9 February 2027 16 February 2027

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

6 October 2026 20 October 2026 13 October 2026	9.00 a.m. to 11.00 a.m.	3 February 2027 10 February 2027 13 October 2026

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

7 October 2026 14 October 2026 21 October 2026	9.00 a.m. to 11.00 a.m.	4 February 2027 11 February 2027 18 February 2027

ChFC04/DPFP04 Investment Planning

8 October 2026 15 October 2026 22 October 2026	9.00 a.m. to 11.00 a.m.	5 February 2027 12 February 2027 19 February 2027

ChFC05/DPFP05 Personal Financial Plan Construction

9 October 2026 16 October 2026 23 October 2026	9.00 a.m. to 11.00 a.m.	6 February 2027 13 February 2027 20 February 2027

DPFP05E Skills and Ethics for Financial Advisers (Retake)

7 October 2026 14 October 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

8 October 2026 15 October 2026 22 October 2026	11.30 a.m. - 1.30 p.m.	5 February 2027 12 February 2027 19 February 2027

ChFC07 Wealth Management and Financial Planning

9 October 2026 16 October 2026 23 October 2026	11.30 a.m. - 1.30 p.m.	6 February 2027 13 February 2027 20 February 2027

ChFC09 Ethics for the Financial Services Professional (Retake)

7 October 2026 14 October 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | November

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

2 November 2026 16 November 2026	9.00 a.m. to 11.00 a.m.	2 March 2027 16 March 2027

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

3 November 2026 10 November 2026 17 November 2026	9.00 a.m. to 11.00 a.m.	3 March 2027 10 March 2027 17 March 2027

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

4 November 2026 11 November 2026 18 November 2026	9.00 a.m. to 11.00 a.m.	4 March 2027 11 March 2027 18 March 2027

ChFC04/DPFP04 Investment Planning

5 November 2026 12 November 2026 19 November 2026	9.00 a.m. to 11.00 a.m.	5 March 2027 12 March 2027 19 March 2027

ChFC05/DPFP05 Personal Financial Plan Construction

6 November 2026 13 November 2026 20 November 2026	9.00 a.m. to 11.00 a.m.	6 March 2027 13 March 2027 20 March 2027

DPFP05E Skills and Ethics for Financial Advisers (Retake)

4 November 2026 11 November 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

5 November 2026 12 November 2026 19 November 2026	11.30 a.m. - 1.30 p.m.	5 March 2027 12 March 2027 19 March 2027

ChFC07 Wealth Management and Financial Planning

6 November 2026 13 November 2026 20 November 2026	11.30 a.m. - 1.30 p.m.	6 March 2027 13 March 2027 20 March 2027

ChFC09 Ethics for the Financial Services Professional (Retake)

4 November 2026 11 November 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule | December

Dates are subject to changes.

Examination Schedule	Examination Time	Deadline to Pass

ChFC01/DPFP01 Financial Planning: Process and Environment

7 December 2026 14 December 2026	9.00 a.m. to 11.00 a.m.	6 April 2027 13 April 2027

ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning

1 December 2026 8 December 2026 15 December 2026	9.00 a.m. to 11.00 a.m.	31 March 2027 7 April 2027 14 April 2027

ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning

2 December 2026 9 December 2027 16 December 2027	9.00 a.m. to 11.00 a.m.	1 April 2027 8 April 2027 15 April 2027

ChFC04/DPFP04 Investment Planning

3 December 2026 10 December 2026 17 December 2026	9.00 a.m. to 11.00 a.m.	2 April 2027 9 April 2027 16 April 2027

ChFC05/DPFP05 Personal Financial Plan Construction

4 December 2026 11 December 2026 18 December 2026	9.00 a.m. to 11.00 a.m.	3 April 2027 10 April 2027 17 April 2027

DPFP05E Skills and Ethics for Financial Advisers (Retake)

2 December 2026 9 December 2026	1.30 p.m. - 2.00 p.m.	120 calendar days from the initial registered examination date

ChFC06 Planning for Business Owners and Professionals

3 December 2026 10 December 2026 17 December 2026	11.30 a.m. - 1.30 p.m.	2 April 2027 9 April 2027 16 April 2027

ChFC07 Wealth Management and Financial Planning

4 December 2026 11 December 2026 18 December 2026	11.30 a.m. - 1.30 p.m.	3 April 2027 10 April 2027 17 April 2027

ChFC09 Ethics for the Financial Services Professional (Retake)

2 December 2026 9 December 2026	11.30 a.m. - 12.15 p.m.	120 calendar days from the initial registered examination date

2026 Examination Schedule

Dates are subject to changes.

DPFP05E Skills and Ethics for Financial Advisers

January

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
-	19 January 2026	26 January 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
16 February 2026	26 February 2026	26 June 2026

March

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
26 February 2026	16 March 2026	23 March 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
13 April 2026	23 April 2026	21 August 2026

May

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
23 April 2026	11 May 2026	18 May 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
8 June 2026	18 June 2026	16 October 2026

June

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
18 May 2026	5 June 2026	12 June 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
3 July 2026	9 July 2026	6 November 2026

July

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
22 June 2026	10 July 2026	17 July 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
7 August 2026	13 August 2026	11 December 2026

September

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
17 August 2026	4 September 2026	11 September 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
2 October 2026	8 October 2026	5 February 2027

November

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
26 October 2026	13 November 2026	20 November 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
11 December 2026	17 December 2026	16 April 2027

December

Onsite Exam Time: 2.30 p.m. - 3.00 p.m.

Registration Starts	Registration Closes	Commencement of Online Course
23 November 2026	11 December 2026	18 December 2026
Completion of Online Course Exam	**Onsite Exam Date**	**Deadline to Pass**
8 January 2027	14 January 2027	14 May 2027

ChFC08 Financial Planning Applications
ChFC09 Ethics for the Financial Services Professional

January 2026

Registration Starts
-

Registration Closes
19 Jan 2026

**14-hour Online Tutorial*
9 a.m. to 5 p.m.**
22, 23 Jan 2026

**Financial Plan Submission Deadline
- Submit by 11.59 p.m.**
8 Feb 2026

1- hour Practicum Assessment (via Virtual Platform)
16 Feb 2026

**ChFC08
3-hour Case Study Written Assessment
2.00 p.m. to 5.00 p.m.**
26 Feb 2026

**ChFC09
Online Assessment**
2 Mar 2026

**ChFC09
On-site Exam:
11.30 a.m. - 12.15 p.m.**
4 Mar 2026

Release of SMART Certificate of Completion for ChFC08 (by 5 p.m.)
20 Mar 2026

Release of ChFC®/S SMART Certificate Parchment (by 5 p.m.)
10 Apr 2026

Deadline to Pass ChFC08 & ChFC09
26 Jun 2026

March 2026

Registration Starts
26 Jan 2026

Registration Closes
19 Mar 2026

**14-hour Online Tutorial*
9 a.m. to 5 p.m.**
26, 27 Mar 2026

**Financial Plan Submission Deadline
- Submit by 11.59 p.m.**
12 Apr 2026

1- hour Practicum Assessment (via Virtual Platform)
21 Apr 2026

**ChFC08
3-hour Case Study Written Assessment
2.00 p.m. to 5.00 p.m.**
30 Apr 2026

**ChFC09
Online Assessment**
4 May 2026

**ChFC09
On-site Exam:
11.30 a.m. - 12.15 p.m.**
6 May 2026

Release of SMART Certificate of Completion for ChFC08 (by 5 p.m.)
22 May 2026

Release of ChFC®/S SMART Certificate Parchment (by 5 p.m.)
12 Jun 2026

Deadline to Pass ChFC08 & ChFC09
28 Aug 2026

* At the end of the 14-hour tutorial, candidates will be provided with instructions on how to book the 1-hour Practicum Assessment.

May 2026

Registration Starts
26 Mar 2026

Registration Closes
21 May 2026

**14-hour Online Tutorial*
9 a.m. to 5 p.m.**
28, 29 May 2026

**Financial Plan Submission Deadline
- Submit by 11.59 p.m.**
14 Jun 2026

1- hour Practicum Assessment (via Virtual Platform)
23 Jun 2026

**ChFC08
3-hour Case Study Written Assessment
2.00 p.m. to 5.00 p.m.**
2 Jul 2026

**ChFC09
Online Assessment**
6 Jul 2026

**ChFC09
On-site Exam:
11.30 a.m. - 12.15 p.m.**
8 Jul 2026

Release of SMART Certificate of Completion for ChFC08 (by 5 p.m.)
24 Jul 2026

Release of ChFC®/S SMART Certificate Parchment (by 5 p.m.)
14 Aug 2026

Deadline to Pass ChFC08 & ChFC09
30 Oct 2026

August 2026

Registration Starts
28 May 2026

Registration Closes
6 Aug 2026

**14-hour Online Tutorial*
9 a.m. to 5 p.m.**
13, 14 Aug 2026

**Financial Plan Submission Deadline
- Submit by 11.59 p.m.**
30 Aug 2026

1- hour Practicum Assessment (via Virtual Platform)
8 Sep 2026

**ChFC08
3-hour Case Study Written Assessment
2.00 p.m. to 5.00 p.m.**
17 Sep 2026

**ChFC09
Online Assessment**
21 Sep 2026

**ChFC09
On-site Exam:
11.30 a.m. - 12.15 p.m.**
23 Sep 2026

Release of SMART Certificate of Completion for ChFC08 (by 5 p.m.)
9 Oct 2026

Release of ChFC®/S SMART Certificate Parchment (by 5 p.m.)
30 Oct 2026

Deadline to Pass ChFC08 & ChFC09
15 Jan 2027

* At the end of the 14-hour tutorial, candidates will be provided with instructions on how to book the 1-hour Practicum Assessment.

October 2026

Registration Starts
13 Aug 2026

Registration Closes
1 Oct 2026

**14-hour Online Tutorial*
9 a.m. to 5 p.m.**
8, 9 Oct 2026

**Financial Plan Submission Deadline
- Submit by 11.59 p.m.**
25 Oct 2026

1- hour Practicum Assessment (via Virtual Platform)
3 Nov 2026

**ChFC08
3-hour Case Study Written Assessment
2.00 p.m. to 5.00 p.m.**
12 Nov 2026

**ChFC09
Online Assessment**
16 Nov 2026

**ChFC09
On-site Exam:
11.30 a.m. - 12.15 p.m.**
18 Nov 2026

Release of SMART Certificate of Completion for ChFC08 (by 5 p.m.)
4 Dec 2026

Release of ChFC®/S SMART Certificate Parchment (by 5 p.m.)
28 Dec 2026

Deadline to Pass ChFC08 & ChFC09
12 Mar 2027

November 2026

Registration Starts
8 Oct 2026

Registration Closes
5 Nov 2026

**14-hour Online Tutorial*
9 a.m. to 5 p.m.**
12, 13 Nov 2026

**Financial Plan Submission Deadline
- Submit by 11.59 p.m.**
29 Nov 2026

1- hour Practicum Assessment (via Virtual Platform)
7 Dec 2026

**ChFC08
3-hour Case Study Written Assessment
2.00 p.m. to 5.00 p.m.**
17 Dec 2026

**ChFC09
Online Assessment**
21 Dec 2026

**ChFC09
On-site Exam:
11.30 a.m. - 12.15 p.m.**
23 Dec 2026

Release of SMART Certificate of Completion for ChFC08 (by 5 p.m.)
8 Jan 2027

Release of ChFC®/S SMART Certificate Parchment (by 5 p.m.)
29 Jan 2027

Deadline to Pass ChFC08 & ChFC09
16 Apr 2027

* At the end of the 14-hour tutorial, candidates will be provided with instructions on how to book the 1-hour Practicum Assessment.

Completion Requirements for ChFC08

Candidates must take note that you will be required to:

- Attend a compulsory 14-hour tutorial for ChFC08 which will be conducted by the SCI according to the course schedule in Table 6.
- Achieve 100% Class Attendance.
- Submit a Financial Plan for Practicum Assessment online.
- Pass a 1-hour Practicum Assessment.
- Pass a 3-hour Case Study Written Assessment.

Important Note

If the financial plan submission deadline, stipulated in Table 6, is missed, the candidate is deemed to have failed the ChFC08 module and he is required to retake the Practicum Assessment with a retake fee of S$163.50 (inclusive of GST at prevailing rate) within the same intake and fulfil completion requirements of ChFC08 by the stipulated deadline. If not, the clawback provision will take into effect.

Candidates are also required to provide a verbal consent of the following before the Tutorial, Practicum Assessment and Case Study Written Assessment:

- Consent to be photographed, videoed and recorded while attending the Tutorial, Practicum Assessment and Case Study Written Assessment.
- Consent given to SCI officer(s) to sight the NRIC (front & back) for ID verification purpose, to capture and match the last 4 characters of the NRIC with those registered in the SCI system.

Submission of Financial Plan

SCI Portal > Dashboard > upload ChFC08 Financial Plan > Select File > (upload your zipped file, not exceeding 25 MB) > Submit > Confirmation Page

Booking Procedure for Practicum Assessment

SCI Portal > Dashboard > Register for ChFC08 Practicum Assessment > (Select your timeslot) > Submit > Confirmation Email

- Each candidate is given 2 weeks to complete the financial plan after the tutorial.
- If the submission deadline is missed, the candidate is deemed to have failed the ChFC08 module and he / she is required to retake the Practicum Assessment with a retake fee of S$163.50 (inclusive of GST at prevailing rate) within the same intake and fulfil completion requirement of ChFC08 by the stipulated deadline. If not, the clawback provision kicks in.
- As certain tablets, including the iPad, do not permit the usage of the camera function and screen-sharing function simultaneously, tablets are discouraged during the Practicum Assessment.
- The system allows submission of only 1 file, which can be a zipped one containing multiple files.
- Submission can only be done **ONCE**.
- Files should not contain any password.
- File size cannot exceed 25 MB.

Items to prepare

For the Tutorial, please prepare your Identification Document (NRIC/Passport), pen, paper, and a non-programmable financial calculator. For the Practicum Assessment, please prepare your Identification Document (NRIC/Passport) and a digital copy of your financial plan. For the Case Study Written Assessment, please bring your Identification Document (NRIC/Passport), non-programmable financial calculator. You may also bring your financial plan, one piece of double-sided A4-sized crib sheet and a pen when you sit for the Case Study Written Assessment.

Completion Requirements for ChFC09

Candidates must complete and pass the online course before taking the on-site examination as stipulated in Table 6. If a candidate fails the on-site examination or fails to fulfil the course requirements for ChFC09, the candidate will be required to re-register for ChFC09 at the retaker fee of S$54.50 (inclusive of GST at prevailing rate). Retaker fee is not eligible for funding.

Release of Result Slips, Smart Certificate of Completion

For ChFC01/DPFP01 - ChFC05/DPFP05 and ChFC06 - ChFC07, a Certificate of Attendance will be issued upon fulfilling the attendance requirement for the tutorials five working days after the last tutorial.

For ChFC01/DPFP01 - ChFC05/DPFP05, ChFC06 - ChFC07, DPFP05E & ChFC09 examinations, candidates will receive their examination results immediately upon completion of the computer mode examinations.

Candidates will receive a SMART Certificate Parchment for the Diploma in Personal Financial Planning (DPFP) within a month after all the required modules, ChFC01/DPFP01 - ChFC05/DPFP05 and DPFP05E have been completed and passed. (Note: ChFC01/DPFP01 is exempted for Cert FPC holders).

For ChFC08, upon fulfilling all completion requirements for ChFC08 on Page 15, a SMART Certificate of Completion will be issued to candidates on the "Release of SMART Certificate of Completion for ChFC08 Dates" as shown on Page 14.

For ChFC09, a SMART Certificate of Completion will be issued within 5 working days once all the online course requirements are fulfilled. A Result Slip will be issued immediately upon completion of the on-site examination.

All SMART Certificates will be sent to the email address of the candidate in the SCI system.

Use of DPFP Designation

Candidates need not apply for the DPFP Designation. Upon successful completion of the examination modules from ChFC01/DPFP01 to DPFP05E within the specified time frame, you will be eligible to use the certification designation: Dip SCI (DPFP).

Use of ChFC®/S Designation

There is no need to apply for the ChFC®/S designation. You may start to use your ChFC®/S designation on the day when you have received the overall SMART Certificate Parchment and Code of Ethics Certificate.

Overall Certificate Parchment for ChFC®/S

With effect from ChFC08 March 2021 intake, for those who have successfully attained their ChFC®/S, we will no longer issue hard copy of the Overall Certificate Parchment for ChFC®/S. Instead, the ChFC®/S holder will receive an overall SMART Certificate Parchment together with the Code of Ethics Certificate on the "Release of ChFC®/S SMART Certificate Parchment Dates" as shown on Page 14. An email will be sent to the ChFC®/S holder from our third-party vendor CV Trust (support@cvtrust.com) on the date as shown in Table 6.

The Code of Ethics Certificate is issued to the ChFC®/S holder who is deemed to agree to abide by the Code of Ethics for as long as he / she is a holder of the designation. If the ChFC®/S holder fails to abide by the Code of Ethics, the SCI has the right to deny the award of the designation and/or suspend the use of the designation in the event that the SCI determines that the ChFC®/S holder has violated the Code of Ethics.

If the ChFC®/S holder wishes to practise in the US, he will need to take the US equivalent papers for the ChFC®/US title. The ChFC®/S title is not transferable in this case.

For details on the "Guidelines For Designation Trademark Use", please refer to here.

Target Audience

- Financial Planners / Life Insurance Advisers;
- Relationship Managers;
- Bancassurance Staff; and
- Other insurance professionals whose job responsibilities require in-depth knowledge of financial planning principles, practices and products, and those wishing to obtain a professional financial planning qualification for their career advancement.

Minimum Entry Requirements

- At least 18 years of age;
- A minimum of 10 years of formal education; and
- Preferably be in financial services activities.

Registration Policy

The order by which modules must be passed

1. ChFC01/DPFP01–ChFC04/DPFP04 can be taken in any order. However, ChFC05/DPFP05 can only be taken upon passing ChFC01/DPFP01–ChFC04/DPFP04.
2. If candidates want to pursue the DPFP qualification, then they are required to take and pass DPFP05E which can only be taken after passing DPFP01–DPFP05 and they must pass by the clawback deadline.
3. Candidates can register for ChFC06 and/or ChFC07 only upon passing ChFC01/DPFP01–ChFC05/DPFP05 or having been exempted from ChFC01/DPFP01–ChFC05/DPFP05 (see Exemption section).
4. Candidates can register for ChFC08 only upon passing ChFC01/DPFP01–ChFC07.
5. ChFC09 must be registered for together with ChFC08.
6. Maximum number of modules allowed to register for is TWO.
7. Candidates may attempt the registered DPFP and/or ChFC/S examinations as many times as necessary within the prescribed maximum completion periods to achieve a passing grade. However, to qualify for IBF-STS funding, candidates must successfully complete the modules by the deadline(s) set by the IBF funding policy.

Candidates will encounter registration issues if the above order is not followed.

Important Note

Registrations for ChFC/DPFP examinations from ChFC01/DPFP01 to ChFC07 open two months ahead of the examination date and close two working days before the examination date. As for ChFC08 and ChFC09, please refer to Table 6.

You will need to provide your full name (as shown in your NRIC/passport), personal mobile number and RNF number at the time of registration. No cancellation or withdrawal of registration is allowed once registration is submitted.

All registrations are subject to review and SCI reserves the right to reject any applications.

Registration for ChFC01 – ChFC09

For ChFC01/DPFP01 – ChFC07 (Self-Study)

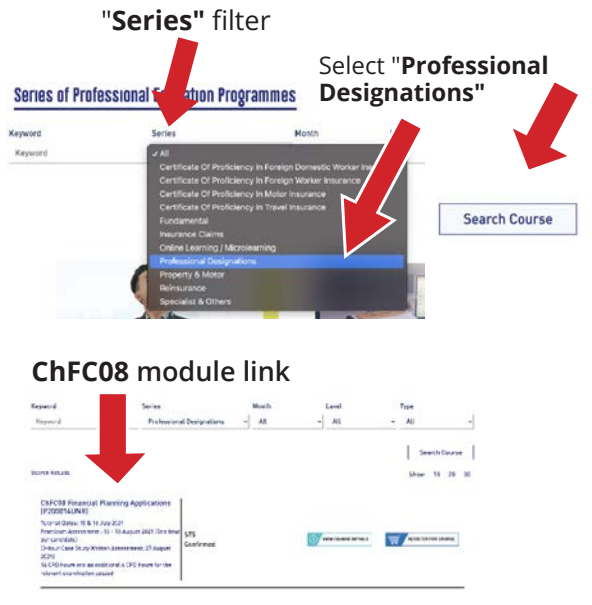
To register for ChFC01/DPFP01–ChFC07 (Self-Study), please click here and navigate to "ChFC/S and CLU/S" tab. Click [Register]. Before you register and pay for ChFC01/DPFP01 - ChFC07, you are required to sign the Student Contract for ChFC01/DPFP01–ChFC05/DPFP05 & DPFP05E and the Clawback Contract for ChFC06 & ChFC07 (refer to Page 5).

For ChFC08 & ChFC09

To register for ChFC08, please go to the SCI website and click on "Professional Education" navigation link on the homepage. You will see the Screenshot 1.0, go to "Series" filter, select "Professional Designations" in the dropdown list and click on the "Search Course" button on your right. A list of ChFC/DPFP registration links will appear. Please click on the ChFC08 module link to register. When you register for ChFC08, ChFC09 will also be registered together. Before you register and pay for ChFC08 and ChFC09, you are required to sign the Clawback Contract (refer to Page 5).

Screenshot 1.0

For ChFC08 & ChFC09



Switching of Routes

Q: If I am registered for a DPFP or ChFC/S module on the Self-Study mode but I failed, can I switch to its T&A track and pay net fee for T&A pathway?

A: Yes. If you have registered for any DPFP or ChFC/S module under the net fee and applied for funded amount of the module fee depending on the funding quantum applicable to you at the point of registration, you must make payment for the funded amount within 7 working days from the date of the clawback invoice issued to you before you are allowed to switch to the T&A route.

You will also have to sign a new Student/Clawback Contract (whichever is applicable) for your first-time registration of the module under the T&A pathway. You will also be required to pay an administrative fee of S$54.50 (inclusive of GST at prevailing rate) and you will be treated as a first-timer for the registered T&A module.

Q: I am registered for the ChFC01/DPFP01 on the T&A pathway, but I failed. Can I switch to Self-Study as a first-timer and pay the prevailing net fee for the module, instead of the retaker fee under the T&A pathway?

A: Candidates are not allowed to switch from T&A pathway to Self-Study mode regardless of modules.

Rescheduling Policy

Administrative Fee Payable

FOR ChFC01/DPFP01 – ChFC07 & ChFC09 Examinations

If Candidates Submit Their Request:*

7 or more working days (excluding weekends and public holidays) before examination date

- No fee is payable for the first time request to reschedule to a date within 45 calendar days from the initial examination date.
- An administrative fee of S$32.70 (inclusive of GST at prevailing rate) per request is payable for request(s) to reschedule to date(s) more than 45 calendar days from the initial examination date.
- An administrative fee of S$32.70 (inclusive of GST at prevailing rate) per request is payable for subsequent request to change the examination date/time for that particular examination.

Less than 7 working days but more than 2 working days (excluding weekends and public holidays) before examination date

- An administrative fee of S$32.70 (inclusive of GST) per request is payable.

2 working days or less (excluding weekends and public holidays) before examination date

- No re-scheduling is allowed

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* Rescheduling applications must be submitted online with payment via the SCI website. Should the candidate decide to reschedule to a later examination date, please note that the maximum completion period will remain as of the first registered examination date.

Note: Counting of the days does not include the actual examination date itself.

If a candidate fails the examination, he / she will have to retake it with the retaker fee payment of S$196.20 (inclusive of GST at prevailing rate). In rescheduling, candidates are to take note of the deadlines to take and pass the examinations with IBF-STS funding as there is a Clawback Provision involved for those modules.

ChFC08

For 14-hour tutorial

Candidates will be allowed to reschedule their 14-hour Tutorial with the rescheduling payment of S$163.50 (inclusive of GST at prevailing rate) to the next Tutorial dates of the upcoming intake. Rescheduling can be done by the candidates on their own on the SCI website. Candidates are required to observe the deadline to fulfil the qualifying requirements for ChFC08 as there is a Clawback Provision involved.

For Practicum Assessment

Candidates will be allowed to reschedule their Practicum Assessment with the rescheduling payment of S$163.50 (inclusive of GST at prevailing rate) to the next available date (within the same intake) set by the SCI. Candidates must be assessed "Competent" before they are allowed to take the Case Study Written Assessment. Candidates are required to observe the deadline to fulfil the qualifying requirements for ChFC08 as there is a Clawback Provision involved.

For Case Study Written Assessment

Candidates will be allowed to reschedule their Case Study Written Assessment date with the rescheduling payment of S$81.75 (inclusive of GST at prevailing rate) to the next Case Study Written Assessment date of the upcoming intake. Rescheduling can be done by the candidates on their own on the SCI website. Candidates are required to observe the deadline to fulfil the qualifying requirements for ChFC08 as there is a Clawback Provision involved.

Absence on Day of Tutorial

ChFC08 tutorial

If a candidate is absent from tutorial day(s) without any of the valid reasons listed in the section on "Absence on Day of Examination/Assessment" and do not fulfil the 100% class attendance, he will be required to reschedule the 14–hour Tutorial with the rescheduling payment of S$163.50 (inclusive of GST at prevailing rate) to the next Tutorial dates of the upcoming intake. Rescheduling and payment can be done by the candidates on their own on the SCI website. Candidates are required to observe the deadline to fulfil the qualifying requirements for ChFC08 and ChFC09 as there is a Clawback Provision involved for each module.

Absence on Day of Examination/Assessment

For ChFC01/DPFP01 – ChFC07 & ChFC09 Examinations and ChFC08 Practicum Assessment/ Case Study Written Assessment

The SCI will grant a complimentary reschedule for the examination session if the candidate is absent from the examination owing to one of the following reasons:

- Medical grounds (self);
- Bereavement (immediate family member);
- Disabling accident or injury (self);
- Court appearance (self); or
- National Service (self, as per the Enlistment Act 1970).

This complimentary reschedule will be considered as the candidate's first reschedule. Any reschedule after, even if they fall into the above categories, will be considered as "Subsequent Rescheduling".

Please email the relevant documentary evidence to the SCI within **three working days** from the date of th examination. You will be rescheduled to the next available examination date or within two weeks from the date of the examination you were absent from. SCI accepts only valid medical certificates issued by registered medical practitioners or hospitals in Singapore.

SCI will process the rescheduling application within **four working days** from the date of receipt of the application and complete supporting documentary evidence. If the documentation is in order, an email will be sent to you by the next working day informing that rescheduling of your examination is completed. However, note that there is a Clawback Provision involved for each module.

Modules Overview

ChFC01/DPFP01/CLUS05/DLI05
Financial Planning: Process and Environment

Provides an overview of the financial planning process, including communication techniques, ethics, risk tolerance, time-value-of-money concepts and financial planning applications. It also offers an understanding of the role and responsibilities of a financial planner, along with some analytical skills to aid in financial decision making.

ChFC02/DPFP02
Risk Management, Insurance and Retirement Planning

Focuses on the use of risk management techniques in treating the risks faced by individuals. It also provides an outline of the basic insurance principles, as well as the various classes of insurance, given the importance of insurance in the risk management process. In addition, it presents the steps in insurance planning to equip the candidates with the knowledge on how to perform insurance planning services.

ChFC03/DPFP03
Tax, Estate Planning and Legal Aspects of Financial Planning

This module highlights the application of income tax laws relating to the transactions of individuals, as well as planning for minimisation and deferral of taxation for the clients.

This module also provides an overview of the legal aspects of financial planning, including common law relating to financial planning, as well as the laws governing successful estate planning. Cases representative of estate planning, including a study of the techniques of estate planning will be presented and discussed.

ChFC04/DPFP04
Investment Planning

This module covers the different risks and returns from the various forms of investments, as well as the types of investment strategies that can be taken, given the increasingly challenging investment environment. It also provides a systematic approach to investment planning and how to deal optimally in a volatile market.

ChFC05/DPFP05
Personal Financial Plan Construction

This module complements the theoretical aspects of financial planning by addressing key practice and plan construction issues. It outlines the essential skills needed to formulate a sound financial plan and how it can be effectively presented. Case studies, with practice questions and answers are also provided to allow for better application of learning.

DPFP05E
Skills And Ethics For Financial Advisers

Ethics and professionalism are two important pillars of the financial industry. The first includes providing professional services and taking into consideration client's best interest. Next is legal compliance. It is important for the financial consultant to be able to see the relationship between ethics and law and how to apply them seamlessly.

ChFC07
Wealth Management and Financial Planning

This module examines the importance of creating and protecting wealth as it has a great impact on clients' current and future lifestyles. It also outlines the proper wealth management techniques and strategies that will help clients to better manage their risks, transfer wealth, and maximise their financial quality of life.

ChFC09
Ethics for the Financial Services Professional

This module provides a practical framework for making ethical business decisions in the financial services industry. It covers the importance of ethics as a subject, the eight-step model of ethical decision-making framework and the three obstacles to ethical decision-making. It describes the elements of an ethical organisation and the characteristics of a financial service professional. The module also investigates ethical approaches to placing financial products, determining suitability, and assessing risk. The three issues of replacement, rebating and compensation are also discussed.

ChFC06
Planning for Business Owners and Professionals

This module focuses on the various forms of business structures and highlights the risks and returns involved in a business investment. It also provides insights on buy-sell agreements and the importance of planning for business succession.

ChFC08
Financial Planning Applications

This module presents a capstone to the ChFC®/S programme by encompassing and encapsulating holistic knowledge that the student has gained from ChFC01 to ChFC07 studies. Case studies and analyses are used to integrate the various planning techniques, tools and products covered in these courses. It also provides practical experience in analysing and solving realistic financial problems of individuals and families, high net-worth individuals and business owners, ranging from simple fact patterns and basic documents to complex situations. Students will gain practical experience in formulating and presenting a holistic Financial Plan covering the 6 steps of financial planning.

Learning Outcomes

By the end of the 9 modules, candidates will be able to:

- Develop knowledge in the process, tools and concepts of financial planning and investments.
- Use a systematic approach to risk management, insurance and retirement planning.
- Apply the basic tax concepts and skills to deal with individual income, expenses and allowances.
- Learn the various types of estate planning tools, such as wills, trusts, powers of attorney and life insurance.
- Understand the major types of investments and risk profiles.
- Learn the essential skills to formulate a sound financial plan to meet clients' objectives and conform to ethical standards and practices.
- Gain insights on the importance of business succession planning and buy-sell agreements.
- Learn wealth management strategies to better manage clients' risks and assets.
- Develop the ability to design, construct and present a financial plan, and make recommendations to clients, as well as function as an ethical and competent practitioner in the field of financial planning.
- Discuss about ethics in the financial services industry.

Examination Mode

For each module (ChFC01/DPFP01–ChFC07), candidates are required to take a 2–hour examination (CSE On-site).

For DPFP05E, candidates are required to take a 30–minute examination (CSE On-site).

For ChFC08, candidates will take a 1–hour Practicum Assessment, as well as a 3–hour Case Study Written Assessment.

The 3–hour Case Study Written Assessment will be held on-site at SCI's premises (CSE On-site), unless otherwise advised. Candidates are to take note that in the event the examination is to be remotely proctored, they must take the examination in an enclosed room and must have access to a laptop with inbuilt microphone, speaker and webcam installed as well as a strong and stable Wi-Fi connection.

For ChFC09, candidates are required to take a 45–minute examination (CSE On-site).

CPD hours awarded

- ChFC01/DPFP01 to ChFC05/DPFP05: 2 CPD hours per module for the relevant examination passed
- DPFP05E: 3 CPD hours for online course and 0.5 CPD hours for examination passed
- ChFC06 to ChFC07: 2 CPD hours per module for the relevant examination passed
- ChFC08: 14 CPD hours and an additional 4 CPD hours for the relevant assessment passed (inclusive of 1 General Insurance CPD hour)
- ChFC09 (online): 6 CPD hours

Start and end date of qualification

For Diploma in Personal Financial Planning (DPFP) – Self Study

Qualification start date shall be the date of the first registered examination date and the end date shall be the date that the candidate passes his last module, which may be 36 months or earlier.

Study Texts

Access to eBooks and eMock Papers/Formula Sheets

Hardcopies will not be issued.

- Candidates may access here.
- Use the same credentials to login as your profile created at SCI website.
- The examination module(s) which you had registered for would be displayed on your user dashboard.
- Access to online study materials will be closed 6 months after the course start date.

ChFC01/DPFP01 Financial Planning: Process and Environment	2nd Edition
ChFC02/DPFP02 Risk Management, Insurance and Retirement Planning	3rd Edition
ChFC03/DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning	7th Edition
ChFC04/DPFP04 Investment Planning	1st Edition
ChFC05/DPFP05 Personal Financial Plan Construction	1st Edition
ChFC06 Planning for Business Owners and Professionals	5th Edition
ChFC07 Wealth Management and Financial Planning	3rd Edition
ChFC08 Financial Planning Applications	3rd Edition

Exemption Policies & Requirements

Please read the Exemption Policies and Requirements thoroughly before completing the Application Form for Exemption Review for ChFC®/S.

Exemption Policies

1. The maximum number of exemptions to be granted to any one candidate is 5 modules, regardless of the number of qualifications held by the candidate.
2. Once an exemption has been granted, the candidate must register for the ChFC®/S Programme within 30 days from the date of the exemption letter. If there is no registration of the ChFC®/S Programme within the 30 days' period, the candidate will need to re-apply for exemption as a fresh application.
3. A candidate can apply for exemption at any stage during his/her study. However, there will not be any fee refund for any module already registered for.
4. Should the candidate decide to apply for exemption after the first registered examination date, the maximum completion period for completion of the ChFC®/S Programme will still start from the examination date which the candidate first registered to sit for.

Requirements to Qualify for Exemption

To qualify for any relevant exemption, the applicant's qualification in consideration must meet all of the following requirements:

1. The qualification / subject(s) in consideration must match at least 80% of the syllabus of SCI ChFC®/S module to be exempted, and their assessment / examination must be of comparable standard to SCI assessments / examinations with a minimum of 70% match to SCI assessment / examination process.
2. The applicant must have obtained the qualification for not more than 10 years from the date of application.
3. The qualification is awarded by an institution or professional body recognised by SCI.
4. The qualification is of an equivalent or of a higher academic standard than that of SCI qualification. The subject in the applicant's qualification must have been obtained by the applicant by taking the examination and not by exemption or transfer of credit from a course or programme previously taken.
5. Candidates who wish to apply for exemption from eligible modules are required to submit an exemption application in accordance with the SCI Exemption Policies and Requirements.

   Exemption Fee Per Module: S$218.00 inclusive of prevailing GST per module applied for exemption.

   The exemption fee is non-refundable and is payable upon submission of each exemption application. Granting of exemptions is subject to SCI's prevailing Exemption Policies and Requirements, and payment of the exemption fee does not guarantee approval of the exemption application.

Exemptions are granted for the following: –

Types of Designation Holders	Exempted Module(s)	Fee Payable (inclusive of GST) (wef 1 Aug 2026)
CFP Holder (FPAS)	ChFC01 to ChFC05	S$1090.00
CFP Holder (FPAS)#	DPFP01 to DPFP04	S$872.00
CLU/S Holder (SCI)	ChFC01, ChFC02, ChFC04 and ChFC06	No exemption payment is required.
Cert FPC Holder (SCI)	ChFC01/ DPFP01	No exemption payment is required.
DPFP Holder (SCI)	ChFC01 to ChFC05	No exemption payment is required.
SUSS BSc (Finance) Holder*	ChFC01, ChFC02, ChFC03	S$654.00

For CFP Holder (FPAS) pursuing the DPFP, you are required to complete DPFP05 and DPFP05E.

* Subject to completion of five designated modules (Retirement Planning, Tax & Estate Planning, Risk Management & Insurance Planning, Financial Plan Construction, Managing Your Personal Finances) under the Finance Electives and University Core Courses.

To apply for exemption, please login to your SCI user Account. After you login, at the Dashboard please select "Apply for Exemption" and complete the application. In your submission, you are required to upload your VALID e-certificate which is subject to our verification for authenticity before we approve your application.

Besides the above exemptions, no other exemption requests will be entertained.

Qualifying Requirements

Education Requirement

A candidate must pass all examinations/assessments and meet all other course requirements for all 9 modules within the 5-year maximum completion period. A candidate must pass all examinations for all 6 (six) modules within the 3-year maximum completion period from the date of first DPFP examination registered for. It is the candidate's responsibility to monitor his own maximum completion period for the examination completion of the DPFP programme. The SCI will not send any notification to remind the candidate in this respect. The 3-year maximum completion period is applicable for those who do not opt in for the IBF-STS funding. Those who seek the IBF-STS funding are subject to the deadline to pass the examinations for each module as per the Clawback provision.

Experience Requirement

3 years of full-time business experience is required for the award of the ChFC®/S designation. The 3-year period must be within the 5 years immediately preceding the date of the award. An undergraduate or graduate degree from an accredited educational institution qualifies as one year of business experience.

Ethics Requirement

The Code of Ethics Certificate is issued to the ChFC®/S holder who is deemed to agree to abide by the Code of Ethics for as long as he is a holder of the designation. If the ChFC®/S holder fails to abide by the Code of Ethics, the SCI has the right to deny the award of the designation and/or suspend the use of the designation in the event that the SCI determines that the ChFC®/S holder has violated the Code of Ethics.

Note: It is the candidate's responsibility to monitor his own maximum completion period for the examination completion of the ChFC®/S programme. SCI will not send any notification to remind the candidate in this respect.

Maximum Completion Period

DPFP Self-study candidates are given 3 consecutive years (or 36 months) from the date of first registered examination date to pass all the 6 DPFP modules. Should they wish to proceed with the ChFC®/S programme, they are given another 2 consecutive years (or 24 months) in addition to 3 consecutive years from the date of first DPFP registered examination date to pass the additional 4 ChFC®/S modules for the award of the ChFC®/S designation. It is the candidate's responsibility to monitor his own maximum completion period for the examination completion of the DPFP or ChFC®/S programme. DPFP modules passed or exempted exceeding 3 years (or 36 months) from the date of first registered examination date are considered outdated passes and will not count towards meeting the DPFP qualifying requirements. Similarly, ChFC®/S modules passed or exempted exceeding 5 years (or 60 months) from the date of first registered examination date are considered outdated passes and will not count towards meeting the ChFC®/S qualifying requirements.

If the candidate does not complete all the modules within the time limit, the modules previously passed or exempted will no longer be valid and the candidate will be required to restart the DPFP or ChFC®/S programmes (whichever is applicable) and sit for all the modules. If there are any changes to the modules, SCI will make every effort to ensure that the candidate is not disadvantaged by such changes. There will be a proper transitional arrangement for the candidate. This maximum completion period requirement is applicable to those who are not seeking IBF-STS funding. For those who are seeking the funding, Clawback Provision deadlines are applicable.

As a rule, no extension to the maximum completion period will be considered and no related appeal will also be entertained. With effect from 1 August 2026, candidates who wish to appeal for an extension of the maximum completion period are required to pay a non-refundable administrative fee of S$109.00 (inclusive of GST) for each appeal submitted. Payment of the appeal fee does not guarantee approval. All appeals will continue to be assessed on a case-by-case basis and must be supported by valid documentary evidence. SCI reserves the right to approve or reject any appeal at its sole discretion. The candidates are required to write in to the SCI at talk2us@scidomain.org.sg with supporting reasons and documentary evidence. The SCI will only consider any appeal applications for extension by candidates whose maximum completion period has expired. The candidates may write in to the SCI within 12 months from the maximum completion period's expiry date to seek for an extension of the maximum completion period. In the event the candidate writes in earlier than 12 months before the lapse of the maximum completion period, The SCI will advise him to write in to the SCI again after his maximum completion period has expired. The SCI will also not consider any appeals that are written in 12 months after the maximum completion period's expiry date.

Continuing Professional Development (CPD) Requirement

The holder of ChFC®/S designation must fulfil a Continuing Professional Development (CPD) requirement of 30 hours every two (2) years. If the holder attains the designation in year 2026, the accumulating period will be from year 2027 to year 2028 The CPD hours earned per accumulating period must be from educational activities in acceptable subject matter areas. The holder needs to maintain accurate records of all CPD activities he undertakes, along with a corresponding CPD hours tally, to verify that he complies with the CPD requirements. These records should be kept for at least 12 months after the accumulating period in which the activities occurred. The SCI may request the holder to submit the records for checks if necessary. Should there be a finding that the ChFC®/S holder does not comply with the Continuing Professional Development (CPD) Requirements, he will not be allowed to use the designation till the required CPD hours have been fulfilled accordingly.

PROGRESSION PATHWAY

Eligible to apply for the following IBF CERTIFICATION

IBF ADVANCED (LEVEL 3)
- Complete ChFC01/DPFP01 - ChFC09 + DPFP05E
- At least 8 years of relevant experience
- Required number of TSCs

IBF ADVANCED (LEVEL 2)
- Complete ChFC01/DPFP01 - ChFC05/DPFP05 + DPFP05E
- At least 3 years of relevant experience
- Required number of TSCs

IBF QUALIFIED (LEVEL 1)
- Complete ChFC01/DPFP01 or Cert FPC
- Required number of Technical Skills Competencies (TSCs)

Find out more here.

CLU®/S CHARTERED LIFE UNDERWRITER®

CHARTERED LIFE UNDERWRITER®/ SINGAPORE

- Awarded by SCI, under licence from The American College of Financial Services

ChFC®/S holders who wish to also obtain CLU®/S are only required to complete 4 modules:
- CLUS01 Individual Life Insurance
- CLUS03 Life Insurance Law
- CLUS04 Life Insurance Company Operations
- CLUS08 Group Benefits and Health Insurance

ChFC®/S CHARTERED FINANCIAL CONSULTANT®

CHARTERED FINANCIAL CONSULTANT® /SINGAPORE

- Awarded by SCI, under licence from The American College of Financial Services

5-module exemptions granted to DPFP holders, and they are only required to complete 4 modules:
- ChFC06 Planning for Business Owners and Professionals
- ChFC07 Wealth Management and Financial Planning
- ChFC08 Financial Planning Applications
- ChFC09 Ethics for the Financial Services Professional

DIPLOMA IN PERSONAL FINANCIAL PLANNING (DPFP)

- Awarded by SCI

Cert FPC holders are only required to complete 5 modules:
- DPFP02 Risk Management, Insurance and Retirement Planning
- DPFP03 Tax, Estate Planning and Legal Aspects of Financial Planning
- DPFP04 Investment Planning
- DPFP05 Personal Financial Plan Construction
- DPFP05E Skills and Ethics for Financial Advisers

1 module exemption granted to Cert FPC holders for:
- DPFP01 Financial Planning: Process and Environment

CERTIFICATE IN FINANCIAL NEEDS ANALYSIS AND PLAN CONSTRUCTION (CERT FPC)

- Awarded by SCI

IBF Certification

ChFC01 / DPFP01 - Financial Planning: Process and Environment addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

Technical Skills and Competencies (TSCs)	Proficiency Level
A13. Ethical Culture	Level 3
B1. Account Management	Level 3
B3. Customer Acquisition Management	Level 3
B5. Customer Experience Management	Level 3
B10. Personal Finance Advisory	Level 3
E10. Client Investment Suitability	Level 3
G15. Product Advisory	Level 3
H8. Customer Acceptance Checking and Onboarding	Level 3

ChFC02 / DPFP02 - Risk Management, Insurance And Retirement Planning addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

G15. Product Advisory	Level 4

ChFC03 / DPFP03 - Tax, Estate Planning and Legal Aspects of Financial Planning addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

B10. Personal Finance Advisory	Level 4
G15. Product Advisory	Level 4

ChFC04/ DPFP04 - Investment Planning addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

E10. Client Investment Suitability	Level 4
E16. Financial Analysis	Level 4

ChFC05 / DPFP05 - Personal Financial Plan Construction addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

B1. Account Management	Level 4
B3. Customer Acquisition Management	Level 4
H8. Customer Acceptance Checking and Onboarding	Level 3

The 3 modules listed below address the following Technical Skills and Competencies (TSCs) and proficiency level:

ChFC06 - Planning for Business Owners and Professionals

ChFC07 - Wealth Management and Financial Planning

ChFC08 - Financial Planning Applications

B10. Personal Finance Advisory	Level 4

ChFC09 - Ethics for the Financial Services Professional and DPFP05E - Skills and Ethics for Financial Advisers addresses the following Technical Skills and Competencies (TSCs) and proficiency level:

A13. Ethical Culture	Level 4

IBF Certification is an industry endorsed mark of quality for finance professionals in Singapore. Individuals who successfully complete an eligible IBF-Standards Training Scheme ("IBF-STS") accredited assessment programme and meet the relevant criteria may apply for IBF Certification.

The IBF Certification is awarded to practitioners who have attained the required skills for the selected industry segment and function, and are expected to uphold values of professional excellence, integrity and commitment to the industry.

Important Note

Holders of ChFC®/S will need to apply for IBF Certification on their own.

How to apply for the IBF Certification (Levels 1–3)

1. Log into your IBF account in the IBF Portal and click on apply for certification under 'My Certification'. You will need to create your IBF account if you don't already have one.
2. Fill in all the necessary particulars

   √ Select 'Singapore College of Insurance' as your training provider and applicants are to select the respective modules of the DPFP and/or ChFC®/S programmes.
3. Upload supporting documents

   NOTE: You will be required to upload a copy of:

   a. ChFC®/S Certificate of Completion

   b. Your CV/Resume (RNF number to be indicated)
4. *For Applicants applying for IBF Advanced Level 2 & 3 only*

   Download the Experience Requirement Form for your HR/Supervisor's endorsement
5. Confirm your application and head to the payment page to complete your application.

   Note that certification fees are currently waived, and fee reflected will be indicated as $0.00 in the invoice.
6. You will be notified via email once IBF approves the application. Should IBF require further clarifications on the Certification Application, an email will be sent to you.

To find out more about IBF certification and the application process, please refer to the IBF's website.

Privacy Policy

Please click at https://www.scicollege.org.sg/Home/Policy

As the Institute of Banking and Finance (IBF) will appoint an independent audit firm to audit the training grants, any candidate may be selected by random for the audit. The appointed auditor may require information such as the candidate's NRIC and contact number. By registering for any of the examinations conducted by SCI, the candidate agrees to release any information required by the audit firm to the appointed auditor, and participate in the audit.

50 YEARS Of

Nurturing Talent and Building Capabilities

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Singapore College of Insurance

PEI Registration No.: 199408491M

Period of PEI Registration: 26-09-2023 to 25-09-2027