

Chartered Banker

Accredited programme


Professional Certificate for Financial Advisors





Table of contents



- 2** About The Parties
 - 3** Overview
 - 4** Interest & Benefits
 - 5** Programme Specializations
 - 8** Registration & Fees
 - 9** Eligibility & Exams
- 

About The Parties



The Institute of Banking & Finance of Trinidad & Tobago

The Institute of Banking and Finance of Trinidad and Tobago (IBF) is a non-profit organization established in 1984. IBF is the educational arm of the Bankers Association of Trinidad and Tobago (BATT). The Institute's Council Members are representatives of participating commercial banks, the Central Bank of Trinidad and Tobago, the Trinidad and Tobago Unit Trust Corporation and the University of the West Indies.

IBF's mission is to facilitate the continuous development of banking and finance professionals and to promote high standards of knowledge, skills and conduct to meet the demands of a changing financial industry.

Chartered Banker Institute

The Chartered Banker Institute was established in 1875 "to improve the qualifications of those engaged in Banking and to raise their status and influence". It is the oldest banking institute in the world, and is the only organization in the world approved by the UK's Privy Council to award the "Chartered Banker" designation.

The Institute as a professional body complements and supports the work of regulators and others in the UK and internationally to develop a sustainable banking industry based on strong and universal principles of stewardship, prudence and professionalism.





Overview

Certificate for Financial Advisors

The Professional Certificate for Financial Advisors (Cert.FA) is a self-study certificate programme. It equips finance professionals with the skills required to provide sound financial advice to clients on the products and services that can help them achieve their financial goals. The programme is accredited by the Accreditation Council of Trinidad and Tobago.

The Cert.FA Programme consists of three specializations: Banking, Mutual Funds and Securities. Each specialization consists of three levels, with Level 1 being the foundation for all specializations.

This programme is **Accredited** by the Chartered Banker Institute, UK (the oldest Banking Institute in the world).

Interest and Benefits

Benefits of the Certificate for Financial Advisors?

- Equips finance professionals with the requisite range of technical knowledge and skills necessary within the financial services sector.
- Encourages the application of acquired knowledge and skills in daily job activities.
- Builds skills for frontline customer service personnel in the finance sector.
- Equips professionals with skills needed for a career in the sales and marketing of financial services and products.



Programme Specializations



Banking Specialization

Level One - Introduction to Financial Services and Products

Financial Planning	Economic Environment
The Regulatory Context for Financial Service Sales	Banking Services of Financial Institutions
Time Value of Money	Taxation

Level Two - Financial Products

Insurance	Mortgages
Consumer Credit	Financial Products & Markets
Retirement	

Level Three - Case Book: Client Assessment and Advice

Programme Specializations



Mutual Funds Specialization

Level One - Introduction to Financial Services and Products

Financial Planning	Economic Environment
The Regulatory Context for Financial Service Sales	Banking Services of Financial Institutions
Time Value of Money	Taxation

Level Two - Financial Products

Mutual Funds - An Introduction	Types of Mutual Funds
Mutual Funds Risks	The Mutual Fund Organization
Fees and Expenses	Fund Pricing
Returns and Performance	Marketing of Mutual Funds
Mutual Fund Customers	Financial Products and Markets
Retirement	

Level Three - Case Book: Client Assessment and Advice

Programme Specializations



Securities Dealers Specialization

Level One – Introduction to Financial Services and Products

Financial Planning	Economic Environment
The Regulatory Context for Financial Service Sales	Banking Services of Financial Institutions
Time Value of Money	Taxation

Level Two – Financial Products

Introduction to Capital Markets	Types of Securities
New Issues	Primary and Secondary Markets
Special Regulatory Requirements	Accounting Analysis
Financial Statement Analysis	Fixed Income Securities Analysis
Fundamental and Technical Analysis	Investment Management
Financial Products and Markets	Retirement

Level Three – Case Book: Client Assessment and Advice



Registration

To register for the Cert.FA Programme, please download, print and complete each of the following forms and return them to our office along with complete payments of the registration, annual membership subscription and programme fees. The Cert.FA Prospectus and the Cert.FA Student Handbook are also available for download and give students more detailed information on the programme. The Membership Application Form can be found in the Membership section of this website. Payments can be made by debit card/credit card or certified cheque. Personal cheques are not accepted by the IBF.

Contact us for the upcoming examination registration deadline dates.

Fees*

Registration Fee

(one-time payment)

Bankers	\$337.50
Non-Bankers	\$675.00

Membership Subscription

(annual payment)

Bankers	\$225.00
Non-Bankers	\$450.00

Programme Fee

(per level payment)

Level 1	\$3495.13
Level 2	\$3495.13
Level 3	\$3495.13

***Certificate Fee of 25 GBP applicable at Level 3**

Finance Ethics Module (Fees are VAT inclusive)	\$1,687.50
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Payment Method

- Direct Deposit
- Linx
- Credit Card
- Personal / Manager's Cheque

*** Cash is not accepted**

Eligibility

To register for the Cert.FA Programme, candidates must meet the following requirements:

- A minimum of two CAPE/GCE Advanced Level passes and five CXC/GCE Ordinary Level passes, including English Language, Mathematics or a Mathematics-related subject. CXC Grade III accepted from 1998.

-OR-

- An appropriate mix of work experience and training in the financial services sector. Candidates may be considered on the basis of their work experience, training and educational background, as deemed relevant by the Institute to be equivalent to the above for the purpose of study.
- Candidates must become members the Institute and maintain an up-to-date membership subscription throughout course of study.

Academic Guidance

The Cert.FA Programme was developed for self-study and as such, taught classes are not offered by the IBF. However, if you are interested in accessing taught classes for the programme, please contact our office to find out more about our recommended tuition providers.

Examinations

Examinations are held twice per year in the months of April and September.

All Cert.FA students will also be required to sit an exam on Finance Ethics as part of the programme. Students will not be allowed to graduate unless they have completed this exam.



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