

## CFA Preparatory Programme Registration Form

**Are you a CFA® Program exam candidate?**

- Yes, my candidate no. is \_\_\_\_\_
- No, I will register online before the stipulated deadline set by CFA Institute.
- No, I am enrolling into this programme for the purpose of self-development and will not be attempting any examination.

**Are you a CFA Society Singapore Associate member?**

- Yes, my CFA Society Singapore Associate ID is \_\_\_\_\_
- No, I wish to sign up for [CFA Society Singapore membership](#).

Please refer to the Programme Planner for more information and select the intake(s) and programme (s) by ticking the boxes.

<p><b>CFA Singapore IBF Accredited Programme</b></p> <p><input type="checkbox"/> New Student   <input type="checkbox"/> Re-Sit Student</p>
<p><b>CFA Singapore Level I Preparatory Programme</b></p> <ul style="list-style-type: none"> <li>- Weekly Live Class (70 Hours)</li> <li>- Revision Class (21 Hours)</li> <li>- Mock Exam (4.5 Hours)</li> <li>- IBF Assessment (2.5 Hours)</li> </ul> <p><input type="checkbox"/> Level I</p>
<p><b>CFA Singapore Non-IBF Accredited Programme</b></p> <p><input type="checkbox"/> New Student   <input type="checkbox"/> Re-Sit Student</p>
<p><b>CFA Singapore Level I Preparatory Programme (Non-IBF)</b></p> <ul style="list-style-type: none"> <li>- Weekly Live Class (70 Hours)</li> <li>- Mock Exam (4.5 Hours)</li> </ul> <p><input type="checkbox"/> Level I</p>
<p><b>Ala Carte</b></p> <p><input type="checkbox"/> New Student   <input type="checkbox"/> Re-Sit Student</p>
<p><input type="checkbox"/> Revision Class (21 Hours)</p> <p><input type="checkbox"/> Mock Exam (4.5 Hours)</p>

**1. Personal Details (all fields are compulsory)**

Please note that incomplete information for any of the fields below will result in the non-processing of this application.

Name in English as in Passport/Identity Card ( <u>underline</u> surname)		<input type="checkbox"/> Singapore Citizen <input type="checkbox"/> Permanent Resident <input type="checkbox"/> Others (Please specify) _____	
Gender <input type="checkbox"/> Female <input type="checkbox"/> Male	Student Status <input type="checkbox"/> New Student <input type="checkbox"/> Current Student <input type="checkbox"/> Ex-CFA Society Singapore Student	Date of Birth (DD/MM/YYYY)	
NRIC/Passport No.	FIN No. (if applicable)	Nationality	
Home Tel No.	Mobile No.	Highest Qualification	
Email Address		Professional Certifications (if any)	
Home Address			

**2. For Company-sponsored Participants Only**

Company Name	Contact Person	Designation
Billing Address		
Email	Contact Number	

**3. Confidentiality Clause**

This information you have provided will be treated with the strictest confidentiality and in accordance with CFA Society Singapore Privacy Policy (<https://cfasocietysingapore.org/privacy-policy-2/>) By signing this form, you give consent to our use of your information.

**4. Registration Document Checklist**

The completed registration form must be accompanied by the following items:

- Proof of programme fee payment

The complete application package should be returned to:

**CFA Society Singapore**

20 Cecil Street, PLUS, #08-10, Singapore 049705

Or SCANNED and EMAILED to [cfasprep@cfasocietysingapore.org](mailto:cfasprep@cfasocietysingapore.org)

Payment Methods:

Fees are payable by cash, cheque(s) (Singapore banks), NETS and Visa/Mastercard/AMEX cards.

For payment by cheque(s), please make it payable to **CFA Society Singapore**

**Terms & Conditions**

**General**

- Registration with CFA Institute is the responsibility of the individual student.
- Enrolment and purchases will only be recognised upon receipt of payment.
- All programme fees quoted are inclusive of GST unless otherwise stated and must be paid in full.

**Transfer Policy**

- Transfer of Classes: After enrolment, any transfer of class will be subject to seat availability. Transfer will be subject to a S\$50 admin fee.
- Transfer of Programme and Intakes: Students who wish to transfer the programme of study to a new intake must withdraw from the current programme and the refund policy applies.

**Refund Policy**

- There is strictly no refund allowed after programme commencement date.

**Withdrawal/Refund Procedure**

- Students must inform CFA Society Singapore in writing with valid reasons for withdrawal/refund accompanied with relevant supporting documents.
- All requests for withdrawal/refund are subject to CFA Society Singapore's approval.
- Upon approval, student will be withdrawn from programme.
- Student will be required to collect the cheque personally from CFA Society Singapore. They will need to provide a letter of authorisation if they wish to authorise a third party to collect on their behalf.
- Strictly no refund for any withdrawal or transfer of class on or after commencement of lessons.

**Declaration by Student**

- 1) I authorise the CFA Society Singapore to seek the necessary verification from the awarding institutions/universities about my educational qualifications, if necessary.
- 2) I authorise CFA Society Singapore to release my personal information to relevant institutes/agencies including, but not limited to, Personal Data Protection Commission (PDPC), CFA Institute (CFAI) and the Institute of Banking and Finance Singapore (IBF Singapore) on (a) matters relating to my programme of study or funding application; (b) regulatory and/or compliance (external and internal) requirements as dictated by the aforementioned bodies; or (c) for the purpose of the aforementioned bodies' annual audit purposes.
- 3) 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 to the best of my knowledge.

\_\_\_\_\_

Full Name of Student

\_\_\_\_\_

Signature of Student and Date

<b>SECTION A: SKILLSFUTURE CREDIT AND SKILLS DEVELOPMENT FUND, IF APPLICABLE (For Singaporeans and PR Students only)</b>	
Student has read the following:	
	The eligibility and the claim procedures of SkillsFuture Credit. More details can be found on <a href="https://www.myskillsfuture.gov.sg/content/portal/en/index.html">https://www.myskillsfuture.gov.sg/content/portal/en/index.html</a>
	It is the sole responsibility of the student to apply for the SkillsFuture Credit approval. The student has 60 days before the start of the course up till the day of its commencement to do so. More details can be found on <a href="https://www.myskillsfuture.gov.sg/content/portal/en/index.html">https://www.myskillsfuture.gov.sg/content/portal/en/index.html</a>
	It is the sole responsibility of the student to update SkillsFuture Singapore should the student have the intention to withdraw, transfer, or defer the study of selected course before start of the course for SkillsFuture Credit. Once the course has commenced, the student will not be allowed to cancel his submission of SkillsFuture Credit.

	<p>The student needs to comply with CFA Society Singapore's policies "(e.g. refund and withdrawal policy)" upon course commencement. Any refund of the SkillsFuture Credit portion will be credited back to the student's SkillsFuture Credit account with SkillsFuture Singapore, as required by SkillsFuture Singapore.</p>																		
	<p>In compliance with SkillsFuture Singapore's guidelines, students who utilise SkillsFuture Credit OR enroll in SSG-funded courses will need to turn on video camera throughout the full training session for the purpose of recording, when the training session is conducted via online learning mode. Students are required to purchase a webcam, if they are using a desktop with no camera function, prior to course commencement.</p>																		
	<p>Is the student applying for the SkillsFuture Credit? YES NO (Pls circle appropriate)</p> <p>Please indicate the amount you wish to claim: S\$ The amount that you have indicated above will be used to offset the qualifying course fees once the amount is approved by SkillsFuture Singapore. The qualifying course fees, as indicated in your Student Contract, is prior to any deduction of SkillsFuture Credit. SkillsFuture Credit deduction will be shown in your receipt following the approval of SkillsFuture Credit by SkillsFuture Singapore.</p>																		
	<p>Breakdown of Course Fee Payable:</p> <table border="1" data-bbox="334 829 1406 1098"> <tr> <td>1</td> <td>Course Fee</td> <td></td> </tr> <tr> <td>2</td> <td>7% GST (on Course Fee)</td> <td></td> </tr> <tr> <td>3</td> <td>Nett Course Fee Payable</td> <td></td> </tr> <tr> <td>4</td> <td>SkillsFuture Credit Amount</td> <td></td> </tr> <tr> <td>5</td> <td>SkillsFuture Claim Reference ID (where applicable)</td> <td></td> </tr> <tr> <td>6</td> <td>Balance Course Fee Payable</td> <td></td> </tr> </table> <p>If you wish to use your SkillsFuture Credit, you can make your claim up to 60 days before the start of the course till the day of its commencement. According to SkillsFuture Singapore, this window period is sufficient for individuals to make claims to facilitate earlier course registration.</p> <p>When making a claim, you should inform your CFA Society Singapore on the intention to use your SkillsFuture Credit and to request for the relevant amount to be offset against the qualifying course fees. After which, you can then submit the claim via the SkillsFuture Credit Portal for the relevant amount to be paid to CFA Society Singapore for your registered course. The actual claimable amount is subject to SkillsFuture Singapore's approval.</p> <p>For more information, please visit <a href="http://www.skillsfuture.gov.sg">www.skillsfuture.gov.sg</a></p>	1	Course Fee		2	7% GST (on Course Fee)		3	Nett Course Fee Payable		4	SkillsFuture Credit Amount		5	SkillsFuture Claim Reference ID (where applicable)		6	Balance Course Fee Payable	
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**SECTION B: WITHDRAWAL/REFUND/TRANSFER/DEFERMENT POLICY AND PROCEDURE**
**Refund Policy**

% of the aggregate amount of the fees paid	If student's written notice of withdrawal is received
100%	More than [60] days before the programme commencement date
70%	Before, but not more than [60] days before the programme commencement date
30%	Before, but not more than [30] days before the programme commencement date
10%	Before, but not more than [7] days before the programme commencement date
0%	On or after the programme commencement date

**Refund for Withdrawal Due to Non-Delivery of Programme**

CFA Society Singapore will notify the student within three (3) working days upon knowledge of any of the following:

- i. It does not commence the programme on the programme commencement date;
- ii. It terminates the programme before the programme commencement date;
- iii. It does not complete the programme by the programme completion date;
- iv. It terminates the programme before the programme completion date;

**IBF Funding Criteria**

- i. Upon being accepted on the CFA Singapore Preparatory Programme, all students must register and attempt the IBF Assessment which will be conducted about 1 – 2 months after completion of training.
- ii. Students must meet a minimum of 75% class attendance (based on total number of training hours; inclusive of core and revision classes) before they are allowed to sit for the IBF assessment. If they do not pass, they are allowed to attempt at the next available sitting of the IBF Assessment. However, if they still fail or are absent at the next available sitting, they are deemed to have NOT met the criteria for IBF funding and will have to pay the equivalent of the IBF funding portion of the programme fee to CFA Society Singapore.
- iii. Only students who meet the above stipulated attendance criteria and pass the IBF Assessment will be eligible to apply for IBF funding.
- iv. Students who fail to complete the programme (meet attendance criteria and pass the IBF assessment) will be disqualified from IBF funding and undertake to pay the balance of the payment of the course fees to CFA Society Singapore. For example, if the full course fee is \$5,000 and your initial payment is 10% (or \$500), you will be responsible to make good the balance 90% (\$4,500) and pay CFA Society Singapore out of your own pocket within 1 month upon receiving notification.



**SECTION C: PERSONAL DATA PROTECTION**

Any personal data you have provided (in particular, your personal identification details) will be treated with the strictest confidentiality and in accordance with CFA Society Singapore Privacy Policy (<https://cfasocietysingapore.org/privacy-policy-2/>). By signing this form, you give consent to our use of your information according to our CFA Society Singapore Privacy Policy and its contents. This includes verification of your educational qualifications.

You understand that, if your programme of choice is eligible for SkillsFuture Singapore (SSG) and Institute of Banking and Finance Singapore (IBF Singapore) funding, CFA Society Singapore will be required to provide your personal data to the relevant government regulatory bodies for their survey purposes. By signing this form, you acknowledge that you are aware of this.

You understand that, if your programme of choice is being delivered online (in part or in full) and is eligible for IBF Singapore (or any other entities') funding, CFA Society Singapore may have to record these classes as they are being delivered online so as to meet the aforesaid entities' regulatory requirements. You understand that the recording may capture your audio, visual or text that appears during the programme of these classes. Under such regulatory requirements, you confirm that you will comply and consent to the classes of your programme of choice being recorded by CFA Society Singapore, which may involve you having to switch on your video camera and microphone during the entire duration of the classes.

You understand that, if your programme of choice is being delivered online (in part or in full), classes of your programme of choice could be disrupted due to various technical issues, CFA Society Singapore may record these classes as they are being delivered online only for students of these classes to view post-delivery. You understand that the recording may capture your audio, visual or text that appears during the programme of these classes. You confirm that you consent to the classes of your programme of choice being recorded. You understand that if you do not wish to be captured in the recording, it is wholly your personal responsibility to take the necessary steps to avoid being recorded.

I understand fully what has been communicated to me and I hereby acknowledge that I have been briefed on the above.

\_\_\_\_\_

Full Name of Student

\_\_\_\_\_

Signature of Student and Date