

CHARTERED FINANCIAL CONSULTANT (ChFC®/S)

Awarded by the Singapore College of Insurance under licence from The American College

TUTORIAL REGISTRATION FORM

Please complete ALL the particulars on this Form below and send or fax it to:

Insurance and Financial Practitioners Association of Singapore (IFPAS)

60 Paya Lebar Rd, #08-32 Paya Lebar Square, Singapore 409051

☎ (65) 6535 1221 📠 (65) 6534 2345 ✉ education@ifpas.org.sg

For all ChFC exam related matters, please refer to
The Singapore College of Insurance (SCI)
<https://www.scicollge.org.sg/>
General Enquiry: 6221 2336

The Singapore College of Insurance (SCI) conducts the ChFC®/S examinations and awards the ChFC®/S designation under licence from The American College. IFPAS markets and conducts the ChFC01 to ChFC07 tutorials while ChFC08 and ChFC09 are conducted by SCI.

PERSONAL PARTICULARS * Delete where appropriate

Title: Dr/Mr/Ms/Mrs * Full Name (as per NRIC): _____

NRIC / Passport No.: _____ Date of Birth: _____

Highest Academic Qualification: _____ Citizenship: Singaporean Citizen / PR

Company: _____ Job Title/Designation: _____

Agency Name: _____

Manager/Director Name: _____

Industry Experience: _____ years in Life Insurance/FA/Wealth Management

Office Address: _____

Tel: (Office / Mobile) _____ E-mail: _____

For Self-Sponsored ChFC Participant

Income/Month: ☐ < \$ 1000 ☐ \$ 1000 – \$ 1999 ☐ \$ 2000 – \$ 2999 ☐ \$ 3000 – \$ 3999 ☐ \$ 4000 – 4999 ☐ \$ 5000 – \$ 5999 ☐ > \$ 6000

MODULES ENROLLED & COURSE DATES:

- | | |
|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> ChFC01 _____ | <input type="checkbox"/> ChFC05 _____ |
| <input type="checkbox"/> ChFC02 _____ | <input type="checkbox"/> ChFC06 _____ |
| <input type="checkbox"/> ChFC03 _____ | <input type="checkbox"/> ChFC07 _____ |
| <input type="checkbox"/> ChFC04 _____ | |

NETT FEE STRUCTURE

- From 1st October 2018, courses that are on full fee would be **converted to nett fee**. This change is to align the fee type operating model across all SSG-funded courses and to defray the upfront cost paid by companies and self-sponsored individuals. For employer-sponsored/self-sponsored candidate, in order to be eligible for SSG funding, he/she is attending the tutorial for the first time.
- The full course fee per module is \$588.50. (\$550.00 + \$38.50 GST) (A)+(C)
- Registration fee per module on nett fee structure for **Employer - Sponsored**:
 - ☐ \$ 66.00 Candidates aged 35 & above, earn < \$2000 per month (Workfare Training Support)
 - ☐ \$ 93.50 Candidates aged 40 & above (SkillsFuture Mid-Career Enhanced Subsidy)
 - ☐ \$ 93.50 Candidates aged 21 & above (SME & Non WTS)
 - ☐ \$ 348.50 Candidates aged 21 & above (Non SME & Non WTS)

APPLICATION OF TRAINING GRANT (TG) - SSG Subsidy Employer - Sponsored

Companies, agency leaders need to submit TG application 30 days before the tutorial commence and indicate the TG reference number.

(Training Grant need to be applied before the class. Failure to do so, applicants will not have a confirmed place in class)

(Agency Leaders who are unable to log into SkillsConnect account to apply Training Grant, participants need to be Self-Sponsored)

- Registration fee per module on nett fee structure for **Self - Sponsored**:
 - ☐ \$ 66.00 Candidates aged 35 & above, earn < \$2000 per month (Workfare Training Support)
 - ☐ \$ 93.50 Candidates aged 40 & above (SkillsFuture Mid-Career Enhanced Subsidy)
 - ☐ \$ 348.50 Candidates aged 21 & above
- The fee payable per module includes the 16-hour tutorial with IFPAS and one SCI study text, which will be issued by IFPAS.

PAYMENT METHODS

For employer-sponsored applicants. Companies, agency leaders who are applying for training grant, the following modes of payment are accepted by SSG: Companies, Agency Leaders' cheque, Bank transfer by Agency Leader.

- ☐ **CHEQUE** – Crossed cheque payable to "IFPAS". (Indicate Name of Participant, ChFC Module, Course Date at the back of cheque)
- ☐ **INTERNET BANKING** – A screenshot of the payment transaction should be emailed to education@ifpas.org.sg. Ensure that **account number, payee and transaction number is reflected clearly**.

IFPAS account details as follows:

- Bank: Standard Chartered Bank
- Current Account No: 1308301194
- Bank code: 7144
- Branch Code: 013

- ☐ **CREDIT CARD** – Master or Visa only. Card No: _____ Expiry Date: _____

FUNDING STRUCTURE

☐ SELF-SPONSORED

IFPAS will apply Training Grant on behalf of ChFC participant. SSG Claims are made by IFPAS in SkillsConnect.

☐ EMPLOYER-SPONSORED

Company apply for Training Grant via SkillsConnect for ChFC participant. SSG Claims are made by IFPAS in SkillsConnect. Sponsoring company pay Nett Fee. **Not applicable for new Agency Leader/Director.**

☐ Non-Citizen

Full fee payment of \$588.50.

Nett Fees Payable for Employer Sponsored Participant

ChFC Tutorial Fees: \$ 550.00 (A)

SSG Training Grant: \$ (B)

+ \$38.50 GST (C)

Nett Fees Payable: [(A) - (B)] + (C)

= \$

TG Reference Number: TG -

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DECLARATION

I declare that I am aware of the following:

- ☐ For all ChFC exam concerns, I note that I am to refer to Singapore College of Insurance.
- ☐ The maximum completion period for the ChFC®/S Programme is **five (5) consecutive years** starting from the date of the first examination registered. If I am unable to complete all nine modules of the ChFC®/S Programme within the completion period of five consecutive years, all my existing credits will lapse and I will be required to restart the entire programme.
- ☐ In addition to examination passes in ChFC01 to ChFC09, I will also need to meet the three-year business experience and Ethics requirements in order to be awarded with the ChFC®/S designation.
- ☐ Renewal of designation is dependent on fulfilling the required CPD hours and SCI also has the right to withdraw the ChFC®/S designation should I be found to violate the ChFC®/S Code of Ethics.
- ☐ No cancellation or changes will be allowed once a module is registered. Registration of exams are done by the candidate.
- ☐ I would need to be IFPAS member to attend the ChFC®/S programme.
- ☐ **I understand that failure to fulfill a minimum of 75% attendance for the course registered, absenteeism, any willful breach of terms and conditions as stipulated in registration from or wrongful declaration on my part will render this application null and void and I will be liable to pay the full course fee of \$588.50.**
- ☐ **IFPAS reserves the right to charge the full course fee of \$588.50 should I not complete the ChFC module exam registered and pass the module within 2 months or any reason where funding is not approved by SSG.**

IFPAS Course Registration Transfer Policy:

1. Request for transfer of registration to the next class intake[^] should be made known to IFPAS 3 working days in advance; otherwise, an admin charge of \$53.50 (inclusive of GST) will be imposed except for valid reasons deemed acceptable by IFPAS. Supporting documents may be required to validate your request.
2. Should IFPAS approve the course registration transfer request to the next class intake[^], the student is required to attend the course date agreed by both IFPAS and the student. Further change of course date after approval of request will be subjected to a penalty of \$107.00 (inclusive of 7% GST).

Course Withdrawal and Refund Policy:

Withdrawal of more than 14 days before class starts	100% refund
Withdrawal of more than 10 days before class starts	80% refund
Withdrawal within 7 days before class starts	0% refund
No show for class (except for emergency cases)	0% refund

Course Postponement due to Medical Reasons

1. In the event of medical leave, the candidate will be required to submit the medical certificate within 3 working days from the course start date. IFPAS will transfer the candidate to the next available tutorial class[^]. In the event of no medical certificate submission, no replacement class will be allocated and candidate would not be eligible to apply for subsidy.

TRAQOM surveys by SSG

- It is mandatory for candidates who have signed up for ChFC courses which are funded by SkillsFuture Singapore (SSG) to provide IFPAS with their name, NRIC, Date of Birth, email address and mobile number to facilitate the conduct of TRAQOM surveys required by SSG.

Eligibility Criteria for SSG Subsidy

- Applicant must achieve at least **75%** attendance, and pass all examinations.
- Applicant is taking the tutorial for the **first time**.
- Agency Leaders/sponsoring companies need to apply **SSG Training Grant** at skillsconnect.gov.sg and pay IFPAS nett fees for company-sponsored participant.
- Participant need to Submit **Result Slip** to IFPAS at education@ifpas.org.sg upon passing of SCI examination

[^] IFPAS has the right to change the class date/s if necessary. Students will be informed of any changes via phone call, email and/or SMS.

- ☐ I accept the above terms and condition.

IFPAS requires your credit card details for holding purposes. No charges will be made unless necessary as stipulated in the above course policy.

Credit Card (Master/Visa Only)

Card No: _____

Expiry Month/Year: _____

Signature of Candidate _____

Date _____