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### **Client Advisor Competency Standards Cacs**

Client Advisory and Competency Standards (CACS) Assessment. The CACS Assessment is applicable to private banking professionals (or "Covered Persons") who are in a client-facing role and provide financial advisory services to high net worth individuals. For more information, please refer to the Association of Banks of Singapore (ABS) for a copy of the Private Banking Code of Conduct and the FAQs on the PB Code.

### **Client Adviser Competency Standards (CACS) | The Institute ...**

The PB Code sets out standards of good practice on competency

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and market conduct expected of private banks. Under the PB Code, private banking professionals (or “Covered Persons”) are expected to pass a common competency assessment called the Client Advisor Competency Standards (CACS) before they provide any financial advice. The CACS took effect from 1 September 2011.

### **Client Advisor Competency Standards (CACS) - Khinloke**

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**CACS Overview | The Institute of Banking and Finance**

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## **Client Advisor Competency Standards (CACS)**

Client Advisor Competency Standards (CACS) Study Guide: Wealth management industry and product knowledge. Paper 2. Institute of Banking & Finance, 2011 - Investment advisors - 274 pages. 0 Reviews. What people are saying - Write a review. We haven't found any reviews in the usual places.

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Provision of Client Advisor Competency Standards (CACS) Mock Exam Question Sets Singapore leader specializing in CACS training and distribution of quality mock questions for CACS Examinations. We provide the most insightful questionns and tuition services to help you pass the IBF CACS papers.

## **Singapore IBF CACS Papers**

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the Client Advisor Competency Standards Examination. This Trial Question Mock Exam consist of 21 questions based on the IBF's Client Advisor Competency Standards book. Our CACS Paper 1 Mock Exam Questions consist of 80 questions inclusive of case study similar to the format of CACS Paper 1 and covers the following topics: Paper 1 : Legislations, Regulations & Industry Codes of Practice - Overview of the Private Banking Business ...

### **CACS Paper 1 Trial Questions (Client Advisor Competency**

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This Trial Question Mock Exam consist of questions based on the IBF's Client Advisor Competency Standards Paper 2 book. Our CACS Paper 2 Mock Exam Questions consist of 80 questions inclusive of case study similar to the format of CACS Paper 2 and covers the following topics: Paper 2 : Industry & Product Knowledge - Investment Concepts- Risk and Return - Portfolio Management- Fixed Income and Equity Securities- Options,

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Futures, Foreign Exchange and Swaps Contracts- Structured Products- Unit ...

## **CACS Paper 2 Trial Questions (Client Advisor Competency**

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The CACS is a competency assessment specifically tailored to strengthen the competency standards of the private banking industry. As long as an individual falls within the definition of a “Covered Person” as stated within the Code, he will have to pass the CACS, unless the “Covered Person”:

### **Private Banking Code of Conduct (PB Code)**

Client advisor competency standards (CACS) study guide. Paper 1, Wealth management legislations, regulations and industry codes of practice / [writers, Alexander Tan... [et al.] ; chief editor, Francis Koh].



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## **Client advisor competency standards (CACS) study guide**

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2.1 Competency Assessment – Client Advisor Competency Standards  
2.1.1 Subject to paragraphs 2.1.3 and 2.2, the Covered Person is expected to pass the Client Advisor Competency Standards (“CACS”) before he/she provides any financial/wealth advisory service to AIs on behalf of his/her Covered Entity.

### **PRIVATE BANKING IN SINGAPORE - ABS**

This programme is eligible for funding under the IBF Standards Training Scheme (IBF-STs), subject to participants meeting all eligibility criteria and successfully completing Client Advisor Competency Standards (CACS) Papers 1 and 2.

### **IBF Level 1 - WMI**

Participants who complete the Bridging Elective and Client

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Advisor Competency Standards (CACS) Papers 1 and 2 will be: Eligible for the "IBF Qualified" certification status for "Wealth Management - Relationship Management - Private Banking" under the IBF Standards Level 1. Eligible for CPD hours.

## **IBF Level 2/3**

The Client Advisor Competency Standards ("CACS") Continuing Professional Development ("CPD") requirement took effect on 1 March 2013. Under the Private Banking Code of Conduct ("PB Code"), Covered Persons are expected to fulfil annual CPD requirements after passing the CACS Assessment.

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