



CFA Society
Singapore

IBF The Institute of
Banking & Finance
Singapore

Approved Prep
Provider



CFA Institute



CFA Singapore - IBF Accredited Programmes

Enrolment Form
Year 2019 Intake

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Course Fees

	Equivalent to a CFA® Curriculum		
	CFA Singapore Level 1 Preparatory Programme (IBF Level 1)	CFA Singapore Level 2 Preparatory Programme (IBF Level 2/3)	CFA Singapore Level 3 Preparatory Programme (IBF Level 2/3)
Course Fee (Before Funding)	\$5,350	\$4,985	\$4,770
For Singaporeans and PRs, 40 years old and below: Fee paid after 70% funding	\$1,605	\$1,495.50	\$1,431
For Singaporeans only, 40 years old and above: Fee paid after 90% funding	\$535	\$498.50	\$477

	CFA Singapore Fund Management Programme (IBF Level 1)	CFA Singapore Research Programme (IBF Level 2/3)	CFA Singapore Portfolio Management Programme (IBF Level 2/3)
Course Fee (Before Funding)	\$4,200	\$3,200	\$2,700
For Singaporeans and PRs, 40 years old and below: Fee paid after 70% funding	\$1,260	\$960	\$810
For Singaporeans only, 40 years old and above: Fee paid after 90% funding	\$420	\$320	\$270

Prices are inclusive of 7% GST.

Eligibility Criteria

Applicants must:

- Be a Singaporean or a Singapore PR (Permanent Resident), physically based in Singapore
 - Either paid by yourself, or sponsored by the company
- Successfully complete the training programme (including passing all relevant assessments and examinations), with least 75% of class attendance

For more information on funding, IBF Certification and Continuing Professional Development (CPD) requirements, please visit www.ibf.org.sg.

Qualifying expenses incurred on the training of both executive and non-executive staff, as well as staff employed on a short-term basis of less than one year (inclusive of contract staff and interns) will be eligible for funding under IBF-STs and FTS, subject to meeting the conditions under these schemes. License agents or representatives (i.e. financial advisors, traders, insurance agents, remisiers) representing a legal principal entity may be included in the claims of the principal entity.

Note: Reimbursement of fund is subject to assessment and meeting minimum requirements. Number of assessments are at the discretion of The Institute of Banking and Finance (IBF).

TERMS & CONDITIONS

• **General:**

- Procedures on course withdrawal, transfer and refund policy can be found in Kaplan Learning Institute (KLI) Student Handbook and website.
- Register with CFA Institute is the responsibility of the individual student.
- Enrolment and purchases will only be recognised upon receipt of payment.
- All course fees quoted are inclusive of GST unless otherwise stated and must be paid in full.
- All bona-fide students will receive a Kaplan Student Access Card.
- KLI reserves the right to vary, amend or discontinue any or all of the discounts as it deems appropriate.
- KLI reserves the right to vary or cancel any of the courses described or alter the composition of the relevant lecturing team, as well as the venue for lectures should the circumstances so require.

• **Transfer Policy:**

Transfer of Classes: After enrolment, any transfer of class will be subject to seats availability.

Transfer of Courses and Intakes: Student who wish to transfer the course of study or to a new intake must withdraw from the current course and the refund policy applies.

- **Refund Policy:** No refund/exchange of materials purchased with courses is allowed. Should a student withdraw and materials are collected, he/she is required to pay the cost of the materials (S\$720.00). Only the net amount after deducting material cost will be refundable. The student concerned will be informed of the final decision in writing within 4 weeks.

Refunds for Withdrawal Without Cause: Where students withdraw from the Course, KLI shall review after receiving the student's written notice of withdrawal and refund to the Student within 7 working days, the following sums:

% of (the amount of fees paid under Schedules B and C). Please refer to Student Contract.	If Student's written notice of withdrawal is received,
80%	More than [60] days before the course commencement date
60%	Before, but not more than [60] days before the course commencement date
50%	Before, but not more than [29] days before the course commencement date
0%	On or after the course commencement date

Refund During Cooling-Off Period: KLI will provide the student with a cooling-off period of seven (7) working days after the date that the contract has been signed by both parties. The student will be refunded the highest percentage of the fees already paid if the student submits a written notice of withdrawal to the KLI within the cooling-off period, regardless of whether the student has started the course or not. In the event that a student wishes to withdraw from the programme, the application fee and the administrative fee are not refundable. Students are liable to pay (where applicable) fees that are imposed by the government authorities or other external partners. For more information on Fee Protection Scheme and refund policy, please refer to www.cpe.gov.sg.

- **Non-Tuition Fees:** Fee Protection Scheme Insurance is non-refundable after commencement of classes. Student membership fees payable to CFA Institute are non-refundable.

- **Withdrawal Without Cause:** KLI will review all written notice of withdrawal supported by relevant documents on a case-by-case basis within 4 weeks. KLI will consider the following as grounds for request to withdraw:

- Overseas assignments of more than 1 month with official letter from company.
- Medical reasons certified by a Singapore registered doctor eg. Hospitalisation.
- Pregnancy certified by a Singapore registered doctor.
- Reservist service of more than 1 month with official document.
- Exemption granted by relevant institution.

- **Withdrawal/Refund Procedure:**

- Student must inform Programme Management in writing and complete a Course Withdrawal Form with reasons for withdrawal/refund accompanied with relevant supporting documents.
- All requests for withdrawal/refund are subject to KLI's approval.
- The student concern will be informed of the final decision of the withdrawal application in writing within 4 weeks.
- Upon approval, student will be withdrawn from their course.
- Refund where applicable will be available within 7 working days from date of approval.
- Student will be required to collect the cheque personally from our Reception Counter. They will need to provide a letter of authorisation if they wish to authorise a third party to collect on their behalf.
- Student will need to sign on the Student Acknowledgement Checklist upon collection of the cheque/credit note.

- **Confidentiality Clause:** This information you have provided will be treated with the strictest confidentiality and in accordance to the Kaplan Privacy Policy. <http://www.kaplan.com.sg/about/privacy-policy/>. By signing this form, you give consent to our use of your information.

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- **IBF Standards Training Scheme ("IBF-STs") – Funding Eligibility:** In order to be eligible for the IBF-STs Funding, student must:

- Be a Singaporean/PR
- Pass the assessment
- Meet the minimum attendance requirements

For more information, visit <https://www.ibf.org.sg/programmes/Pages/IBF-STs.aspx>

DESCRIPTION/FEEES	CLASSES
CFA SINGAPORE LEVEL 1 PREPARATORY PROGRAMME (IBF LEVEL 1) Member S\$4,930 Non-Member S\$5,350	1A <input type="checkbox"/> 1B <input type="checkbox"/> 1A <input type="checkbox"/> 1B <input type="checkbox"/>
CFA SINGAPORE LEVEL 2 PREPARATORY PROGRAMME (IBF LEVEL 2/3) Member S\$4,665 Non-Member S\$4,985	2A <input type="checkbox"/> 2B <input type="checkbox"/> 2A <input type="checkbox"/> 2B <input type="checkbox"/>
CFA SINGAPORE LEVEL 3 PREPARATORY PROGRAMME (IBF LEVEL 2/3) Member S\$4,500 Non-Member S\$4,770	3A <input type="checkbox"/> 3A <input type="checkbox"/>
CFA SINGAPORE FUND MANAGEMENT PROGRAMME (IBF LEVEL 1) Member S\$3,780 Non-Member S\$4,200	1A <input type="checkbox"/> 1B <input type="checkbox"/> 1A <input type="checkbox"/> 1B <input type="checkbox"/>
CFA SINGAPORE RESEARCH PROGRAMME (IBF LEVEL 2/3) Member S\$2,880 Non-Member S\$3,200	2A <input type="checkbox"/> 2B <input type="checkbox"/> 2A <input type="checkbox"/> 2B <input type="checkbox"/>
CFA SINGAPORE PORTFOLIO MANAGEMENT PROGRAMME (IBF LEVEL 2/3) Member S\$2,430 Non-Member S\$2,700	3A <input type="checkbox"/> 3A <input type="checkbox"/>

*All prices are inclusive of the prevailing GST.

FOR OFFICE USE ONLY

Course Fee: \$

Receipt No:

Date:

Attended by: _____

Collected: Yes No Partial

Items Collected: _____

Activation Date:

Discounts:

Registration Form for 2019 Intake

Jan Jul

Are you an CFA® exam registrant?

Yes, my CFA® candidate no. is

Gender: M F

No, I understand my exam sitting will not be in June/December

No, I am enrolling into this programme for purpose of self-development

Are you a CFA Singapore Associate local member?

Yes, my CFA Singapore Associate local member no. is

No, I wish to sign up for CFA Singapore membership

Have you studied at Kaplan Learning Institute before? Yes No

Highest Qualification (please attach a photocopy of your highest qualification): _____

Name of Institution: _____

Name (Mr/Mrs/Miss) as in Passport: _____

Date of Birth:

Address: _____

Unit: # _____

Postal Code: _____

Company Name: _____

Designation: _____

NRIC No./FIN No.: _____

Nationality: Singaporean PR WP EP S Others: _____

For PR/WP/EP/S holder, please state your nationality: _____

Tel(O):+65

Tel(H):+65

Mobile:+65

Email:

Mode of Payment

Cash Nets Visa/Mastercard/Amex

Cheque No.:

Payable to "Kaplan Learning Institute Pte Ltd"

Fee Protection Scheme (FPS)

I am fully aware that I am required to opt in for FPS.

I would like to receive information and/or marketing offers from Kaplan:

Email SMS Phone

Signature: _____

Date:

All information contained in this brochure is accurate at time of print (August 2018). KLI reserves the right to vary this information should the circumstances so require.

Kaplan Learning Institute Pte Ltd

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KaplanLearningInstitute kaplan.com.sg/kli



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