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## ASSOCIATE FINANCIAL CONSULTANT (AFC) DESIGNATION APPLICATION FORM

PERSONAL PARTICULARS		
Full Name	NRIC No.	IFPAS Mem. No.
Mailing Address	Postal Code	
Email Address	Mobile No.	Office Tel.
Company	RNF No.	Date Joined Industry
Name to be printed on the certificate		

COURSES COMPLETED (Please attached photocopies of certificates/result slips)	YEAR
1. FChFP Module 1 - Fundamentals of Investment and Financial Planning;	
2. HS320 - Fundamentals of Financial Planning (TAC/SCI)	
3. Diploma in Life Insurance (TAC/SCI) and HS328 - Investments (TAC/SCI)	
4. ChFC01 -Financial Planning: Process And Environment	
5. Diploma in Financial Planning (SCI)	
6. Bachelor of Business (Financial Planning) (RMIT) - EF241 - Personal Financial Management - EF440 - Investment and Portfolio Management	
7. Associate Financial Planner Course	
8. Certificate in Financial Need Analysis and Plan Construction (SCI) (graduates after 10 Sep 2007)	

### DECLARATION

1. To the best of my knowledge and belief, the statements made on this application are true and correct.
2. In consideration of the award of the AFC designation, I agree that IFPAS shall have the authority to:
  - a. establish and from time to time change the conditions under which the AFC designation is to be awarded and used, and
  - b. suspend, revoke or modify in writing my privilege to use the AFC designation.
3. I agree that in addition to the IFPAS membership requirement, a decisive factor in the determination of my eligibility of the designation shall be my ethical practice in my profession.
4. I undertake not to use the AFC designation except as authorised pursuant to this Agreement.

IFPAS is committed to protecting our members and subscribers personal data in accordance with the Singapore Personal Data Protection Act (PDPA).

In line with the PDPA, by submitting this form, I hereby give my consent to IFPAS to collect, use and disclose my personal data for the purposes of administering and processing of payments for membership and events and/or to receive further information from IFPAS and/or for communication pertaining to all my membership, event and course information.

I am aware that I may update the personal data and/or withdraw the consent provided by me at any time by contacting

Signature of member/ Date: \_\_\_\_\_

### PAYMENT MODE

- ☐ By PayNow (UEN: S69SS0017L)
- ☐ By Cheque (crossed and payable to **IFPAS**)  
Bank & Cheque No. \_\_\_\_\_
- ☐ By Credit Card (Visa/MasterCard Only)  
Cardholder's Name \_\_\_\_\_
- Card No. \_\_\_\_\_ Exp Date \_\_\_\_\_

**Mode of Submission:**

- 1) Email to: [studentsupport@ifpas.org.sg](mailto:studentsupport@ifpas.org.sg)
- 2) Mail to: IFPAS, E&T Dept, 60 Paya Lebar Road #08-32 Paya Lebar Square, Singapore 409051

Official Use Only:

Receipt No	Date	Staff Name/Sign	Remarks

**NOTES TO APPLICANTS**

1. Only IFPAS members are eligible to apply for the AFC designation.
2. Applicants must have at least 1 year experience in the life insurance or the financial services industry on the date of application.

	Date of Application			
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
AFC Designation fee	\$40.00	\$30.00	\$20.00	\$10.00
9% GST	\$3.60	\$2.70	\$1.80	\$0.90
Total payable	\$43.60	\$32.70	\$21.80	\$10.90

4. The renewal date of the AFC designation shall be on 1 January each year.
5. In order that the renewal of the AFC designation can be approved, the AFC designee must have a current IFPAS membership.

**WHY THE ASSOCIATE FINANCIAL CONSULTANT DESIGNATION**

We have recently observed a major evolution in the financial services industry. Existing financial products are increasingly combined for better appeal to customers. New hybrid products are being introduced. Consumers' demand for more sophisticated insurance and investment instrument is growing.

Suitably, only financial service practitioners who are attuned to the changes and have learned sophisticated financial tools can effectively meet their clients' specific demands.

This designation promptly responds to this major evolution and aims to meet the needs of this breed of financial services practitioners. A series of courses and seminars will be conducted for holders of this designation giving them the opportunity to upgrade their knowledge both in insurance and other important related areas so that sophisticated and discerning clients can be better serviced.

**APPLICATION CRITERIA**

1. Financial services practitioners may apply for the AFC designation if they have successfully completed any of the following courses:
  - FChFP Module 1 - Fundamentals of Investment and Financial Planning
  - HS320 - Fundamentals of Financial Planning/OR Diploma in Life Insurance and HS328 - Investments of the CLU/CHFC designations offered by the Singapore College of Insurance (SCI) or The American College (TAC)
  - ChFC01 - Fundamentals of Financial Planning and Investments
  - Diploma in Financial Planning (Dip FP) offered by SCI
  - Bachelor of Business (Financial Planning) (Royal Melbourne Institute of Technology)
    - EF241 - Personal Financial management and
    - EF440 - Investment and Portfolio Management
  - Certificate in Financial Needs Analysis and Plan Construction (SCI) (graduates after 10 Sep 2007)
2. Applicants must have at least 1 year experience in the life insurance or financial services industry.
3. Application forms are obtainable from the IFPAS Secretariat. Completed application forms must be accompanied by the payment of the requisite designation fee and the relevant photocopies of certificates/result slips.
4. Please note that applicants are required to be IFPAS members in order to be eligible to apply. AFC designees must maintain their IFPAS membership in order to use the AFC designation.

**RENEWAL OF DESIGNATION**

1. The AFC annual designation renewal fee is S\$43.20 (inclusive of 8% GST) and is due on 1 January each year.
2. Renewal Forms for the renewal of the AFC designation will be sent out on or around 1 January each year. Renewal Forms can also be downloaded from our website [www.ifpas.org.sg](http://www.ifpas.org.sg).
3. Completed Renewal Forms must be returned to the IFPAS Secretariat by 31 March accompanied by photocopies of verified evidence of attendance and completion of courses in the 12 months preceeding the renewal period where Continuing Professional Development (CPD) hours have been awarded.