

SGUNITED SKILLS PROGRAMME

Modern Services



Up-Skill in Financial Advisory Services

Course code: GBR

Course Overview

This course focuses on equipping you with deeper insights into the provision of financial advisory services and wealth management. Those who complete the Specialist Diploma programme will gain skillsets to acquire new clients and build client relationships, create sound financial plans to assist clients in reaching their financial goals, explain how the investment products meet clients' needs, and perform data analytics for investment and marketing

Career Opportunities

Upon completion of the course, graduates can look forward to career opportunities in roles such as:

- Assistant Relationship Manager
- Financial Planning Manager
- Financial Consultant
- Senior Financial Consultant

Minimum Entry Requirement

- Singapore Citizens and Singapore Permanent Residents, aged 21 & above
- At least a Polytechnic Diploma or ITE Technical Diploma/ Technical Engineer Diploma/ Work-Learn Technical Diploma

Applicants who do not meet the entry requirements may be considered for admission to the course based on evidence of at least 5 years of relevant working experience or supporting evidence of competency readiness. Suitable applicants who are shortlisted may have to go through an interview and/or entrance test. The Polytechnic reserves the right to shortlist and admit applicants.

Important information for you

With the new support scheme, you can now earn up to \$1,200 per month by attending courses and equipping yourself with industry-relevant skills and knowledge.



View courses

Find all courses at:
www.tp.edu.sg/sgus



Application Period

09 November 2020 - 04 January 2021
[APPLY HERE](#)



Training Allowance \$1200 per month

- Min. 75% attendance requirement



Nett Course fee

6-month course - \$500
12-month course - \$1000
Use your SkillsFuture Credits!

Click [here](#) for FAQ.

Reach out to us!
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UP-SKILL IN FINANCIAL ADVISORY SERVICES | 08 MARCH 2021 INTAKE

Course fee: **\$500.00**

Course Duration: **6 months | Full day training**

Course commencement date: **08 March 2021**

Application period: **09 November 2020 – 04 January 2021**

APPLY NOW

COURSE CODE: GBR

Full Course fee before subsidy: \$15,999.00

Please take note of the following requirements in order to be eligible for the subsidy:

- 1. Trainees must fulfil minimum attendance requirements and pass assessments to qualify for course fee subsidies. Trainees who are unable to meet these requirements may be asked to return the course fee subsidies that they have received.*
- 2. The programme allows trainees to exit without penalty if they are successfully placed into a job or have secured a job on their own accord while undergoing training. However, trainees who exit the programme without a valid reason may be asked to return the course fee subsidy that they have received.*

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COURSE OUTLINE

Specialist Diploma in Financial Advisory Services

This course provides participants with the insights into the provision of financial advisory services and wealth management.

What you will learn

Certificate in Marketing & Financial Planning

- Marketing & Client Servicing
- Financial Planning & Needs Analysis

Certificate in Investment Products & Data Analytics

- Investment Products & Development
- Data Analytics for Investment & Marketing

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Robotic Process Automation for Beginners

This course aims to give participants a glimpse into the limitless possibilities of robotic process automation. Participants will also learn how to use RPA to automate repetitive, computerized administrative tasks.

What you will learn

- Introduction to RPA: What is it?
- Learn to develop a basic RPA script
- Best practices for automation

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Basic Business Analytics @ Work

This workshop is a quick jumpstart to do basic business analytics. Participants will get to understand of the importance of Analytics, to get hands-on experience to handle data, as well as to create interactive dashboards. This workshop will also show case the potential and possibilities of doing more with advance business analytics.

What you will learn

- Introduction to Analytics
- Business Analytics Life Cycle
- Text Mining

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Data Visualisation

This course focuses on the skills to analyse, visualise and present analysed data. It will cover the knowledge and best practices of data visualisation with commercial visualisation software.

What you will learn

- What is data visualisation?
- The different types of data visualisation
- Overview of the applications of data visualization
- Applying data management
- Understanding data attributes, data quality dimensions
- Analysing the nature of raw data
- Preparing for data cleansing
- Handling data cleansing, data visualisation techniques
- Understanding the various visualisation techniques
- Applying appropriate techniques to display data
- Building a basic dashboard using appropriate reporting components
- Validating the selection of graphical representations

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Data Storytelling

In this workshop, participants will learn to communicate data findings, tailored to a target audience, by connecting the dots using compelling narratives and visuals such as storyboarding and visual aesthetics.

What you will learn

- Be equipped with concepts and techniques to transform data into stories
- Learn various attributes that can alter the impact on your audience
- Gain a new perspective to communicate your data differently

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Predictive Analytics For Business Users

This course covers the concepts, methodology, and techniques needed to provide an end-to-end analytics solution. Preparation of raw data into "analytics-ready" data and popular techniques such as supervised and unsupervised learning will be introduced.

What you will learn

- Introduction to Predictive Analytics
- Data Preparation
- Predictive Models

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Data Science Essentials

This course covers the fundamental skills needed to kick-start a data science project by using an open-source programming language. It focuses on how to read, explore, manipulate data and present data using the right visualisations. There will be guided programming and participants will learn how to perform data exploration and analysis techniques to discover new knowledge from data to aid data-driven decisions in an intelligent and informed way.

What you will learn

- Introduction to Data Science
- Data Types and Structures
- Exploratory Data Analysis (EDA) with visualizations
- Communication with Markdown report

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Text Analytics for Business Users

This course covers the knowledge and best practices of text analytics. Several popular techniques such as text topics, text clustering and sentiment analysis will be introduced. Participants will learn to use a user-friendly, GUI-based process flow designing tool to automate the entire process of extracting, preparing and analyzing textual data.

What you will learn

- Introduction to Text Analytics
- Text Pre-processing
- Text Analytics

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Design Thinking in Action - The SEE Cycle

This course will help non-designers sift through the jargon and gain insight into the cyclical and highly iterative creative thinking process. Participants will be encouraged to adopt an open and expansive mindset that will embrace productive failure, risk-taking and deep inquiry.

What you will learn

- Overview Of Design Thinking
- Introduction To The SEE Cycle
- Beginning With The Right Mind-set
- Presenting The Design Challenge
- The Power Of Empathy
- Identifying the Issue
- Deconstruction and Reconstruction
- Presentation and Critique
- Generating New Ideas
- Discovering the Impossible
- Distilling the Best
- Validating Viable Options
- Presentation and Critique
- Summary and Conclusion

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Business Analytics for Management

This course introduces business analytics to the management and allow participants to appreciate the benefits that organization can derive from it. Analytics software tools will also be introduced together with the methodologies used in the process of decision making.

What you will learn

- Gain a quick overview of business analytics and appreciate how organisation can benefit from it
- Appreciate the various application areas of analytics with use cases
- Appreciate the methodologies used in analytical decision-making
- Appreciate the capabilities of analytics software tools

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Fundamentals of the Personal Data Protection Act

The course will train participants to identify key legislative and regulatory requirements under the PDPA and will look at the role of the Data Protection Officer and how to manage data breaches.

What you will learn

- Identify key legislative and regulatory requirements under the PDPA including the 9 key obligations under the PDPA, the provisions relating to “Do Not Call
- Manage data breaches through case study.

Participant Pre- requisites

Participants are assumed to be able to:

- Understand relevant organisational strategies, objectives, culture, policies, processes and products / services;
- Have information gathering skills to gather and collate necessary data;
- Have analytical skills to assess policies and procedures;
- Have business writing skills to prepare management report;
- Have interpersonal and communication skills to interact with relevant stakeholders;
- Have facilitation skills to ask the right questions to elicit necessary information; and
- Be aware of compliance requirements of organisation.

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Industry Project / Industry Attachment

This programme involves project-based learning, where you are required to be either attached to companies or work on real-life projects for companies or centres, related to your course of study. You are expected to undertake various activities discussed with and assigned by the supervisors or participating host organisations. The programme enables you to apply knowledge and skills acquired in the course of your study to address practical problems in the real workplace.

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The information in this brochure is accurate at the time of updating (28 Sep 2020).



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