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~~CACS Overview | The Institute of Banking and Finance~~
As part of the annual CACS CPD requirement, Covered

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Persons are expected to achieve a minimum of 15 CACS CPD hours, of which a minimum of 8 hours should be in training that is accredited under the IBF Standards Training Scheme (“IBF-STS”) in Private Banking and Wealth Management segment or Generic Skills and Competencies and a minimum of 4 hours should be in training related to Rules & Regulations, Compliance or Ethics.

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The PB Code sets out standards of good practice on competency and market conduct expected of private banks. Under the PB Code, private banking

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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) –
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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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~~CACS (Client Advisor Competency Standards) Paper 1
Trial ...~~

Client Advisor Competency Standards (CACS) Paper 1
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The exam results will be displayed on the computer
screens after the exam. Printed result slips will not be
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Client Advisor Competency Standards (CACS) Paper 2 - Industry & Product Knowledge. The exam results will be displayed on the computer screens after the exam. Printed result slips will not be issued. This paper is eligible for IBF-STS Funding. Please click here for more information.

~~CACS Paper 2 Details | The Institute of Banking and Finance~~

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Institute of Banking & Finance , 2011 - Banks and...

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Client Advisor Competency Standards (CACS) Paper 2 - Industry & Product Knowledge. The CACS Series is for persons who wish to work in the Wealth or Private Banking industry. New Syllabus (commenced 1 Feb 2019) - Portfolio Management Process - Macroeconomic Analysis

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Section B: Competency Assessment- Client Advisor Competency Standards (CACS) (B1) Who the CACS applies to 6-15 5 (B2) Validity of the CACS 16-18 7

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CACS Paper 2 Set B (Client Advisor Competency Standards) This is the 1 out of 3 sets of CACS Paper 2 Mock Exam Questions. This paper is to be done in 2 hours as per actual IBF CACS Paper 2 Exam. This set of CACS Paper 2 consist of 100 questions inclusive of case studies similar to the format of CACS Paper 2 and covers the following topics:

~~CACS Paper 2 Set B (Client Advisor Competency Standards)~~

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

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

~~CACS Paper 2 Trial Questions (Client Advisor Competency ...~~

CACS Paper 1 Set C (Client Advisor Competency Standards) This is the 1 out of 3 sets of CACS Paper 1 Mock Exam Questions. This set of CACS Paper 1 consist of 80 questions inclusive of case study similar to the format of CACS Paper 1 and covers the

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following topics:

~~CACS Paper 1 Set C (Client Advisor Competency Standards)~~

CACS Paper 1 Set B (Client Advisor Competency Standards) This is the 1 out of 3 sets of CACS Paper 1 This set of CACS Paper 1 consist of 80 questions inclusive of case study similar to the format of CACS Paper 1 and covers the following topics:

~~CACS Paper 1 Set B (Client Advisor Competency Standards)~~

If the assistant relationship manager (ARM) concerned meets the definition of “overed Person” under the P

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ode, the ARM would need to pass the competency assessment - Client Advisor Competency Standards (CACS) before he can provide financial advisory services to his clients.

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