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CACS Overview | The Institute of Banking and Finance

The PB Code sets out standards of good practice on competency 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.

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

Client Advisor 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.

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.

Private Banking Code of Conduct (PB Code)

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Client Advisor Competency Standards Paper 1 Questions

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.

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