

5TH



ASIA TRUSTED LIFE AGENTS & ADVISERS AWARDS

2020

HOW TO ENTER

LAUNCH **8 JAN** | DEADLINE **23 MAR** (THIRD-PARTY NOMINATIONS)
31 MAR (FULL NOMINATIONS) | JUDGING DAY **15 MAY SINGAPORE** |
GALA AWARDS DINNER **27 JUL KUALA LUMPUR MALAYSIA**

Organisers

Co-Organiser

Strategic Partner



www.AsiaAdvisersNetwork.com/awards



ORGANISERS:

CO-ORGANISER



STRATEGIC PARTNER:



SUPPORTED BY:



The search for stars

This is the 5th Asia Trusted Life Agents & Advisers Awards. Over the past editions, we have been enlightened by the rich and dynamic role that agents and advisers play in being the face of life insurance to the buying public. What is most heartening is that to many of these agents and advisers, it is so much more than just a job. Many of them do a great deal of social work and charity beyond the call of their duty. This is what we really want to salute. They are still very much the unsung heroes of the industry.

The second group of people we want to salute is the insurance executive and managers from insurance companies who do so much behind the scenes to help these agents excel. What they do in caring and nurturing the agents and advisers is truly remarkable, too.

So, for now, we are all set to spot the stars of the industry for 2020 in a world which is still very high-touch despite being so high-tech. We are looking for those stars who help to spread trust in the insurance industry in their everyday chores and routine.

In the last four years, we have saluted some 45 winners from 21 companies and 11 markets, and we can see

what rich pageantry this is. We have also through AAN - Asia Advisers Network - reached out to professionals like you online with over 16,000 followers on Facebook alone.

With co-organiser LIMRA and Founding Patron, Mr Mark Tucker, Group Chairman, HSBC, and a distinguished panel of judges drawn from the various leading insurance companies, associations, and training institutes, we are very proud to launch this 5th ATLAA. It stands out as a truly professional Awards given its defined criteria and transparent judging process that is independently audited by EY.

We remain committed to the search for excellence as our CSR for the industry which we so love and honour. We see the professionalism in the industry only rising. So all is good as they say.

Keep the entries coming. Remember there is no fee to enter the awards and self-nominations are most welcome. All it takes is believing in yourself and standing tall to be counted for the industry. We want to see the best win, always.

Dare yourself to shine.



Mr Sivam Subramaniam
Editor-in-Chief
Asia Insurance Review



Mr Benjamin Ang
Editor
Asia Advisers Network

There has never been a greater need for financial advice

LIMRA is honoured to co-organise the 5th Asia Trusted Life Agents & Advisers Awards 2020, which recognises accomplished agents and advisers, and their commitment to serving their customers.

The world continues to change at an incredibly fast pace, and our industry must keep up with this pace to remain relevant to our customers.

Agents have to continuously evolve and think of new and unique ways to engage their customers. With Asia's rapidly ageing population and widening retirement savings gap, there has never been a greater need for financial advice. Understanding the best approaches to connect, communicate, and educate customers is critical to success.

LIMRA is a research-led organisation, offering actionable, credible insight into insurance and retirement trends. We focus on research and training programs that help you and your companies develop successful strategies to address industry challenges, fulfilling our common mission to protect families' financial security throughout their lives.

It is important to recognise the people that are working with customers every day to achieve financial security. I encourage you to nominate an agent or adviser who represents the best and brightest of our industry.



Mr David Levenson
President & CEO
LIMRA, LOMA and LL Global

Continuing to go from strength to strength

As Founding Patron of the Asia Trusted Life Agents & Advisers Awards, I am delighted to see the Awards continue to go from strength to strength.

The long term success of the life insurance business depends on marrying the best customer service with the best new technologies. These awards demonstrate how agents and advisers are already doing so to great effect, and show why they are so critical to the future of the industry.

For many customers, agents and advisers are the human face of life insurance, with the ability to build trusted relationships with customers, understand their needs and recommend the right products and services to meet them.

As life insurance becomes increasingly linked to wellbeing, they play a significant role in helping people

to live healthier lives. In addition, by embracing digital technologies, advisers and agents can increase coverage, offer new products and services and help to close the protection gap.

The accelerating pace of change creates an opportunity to innovate, invest and partner with others, to make insurance more accessible and engage with a wider range of consumers, especially younger people. Agents and advisers have a key role to play in making the most of that opportunity.

I would like to thank Asia Insurance Review and Asia Advisers Network for helping us to celebrate the best of agency and advisory, and the enormously valuable contribution that they make to the industry and to the communities in which we work and live.



Mr Mark Tucker
Group Chairman, HSBC

THE JUDGES



Ms Anusha Thavarajah

CEO, Life and Health,
Allianz Asia Pacific



Mr Bosco Lau

Regional Managing Director,
LIMRA and LOMA



Mr Ben Tan

Managing Director, Regional Agency,
FA and Bancassurance,
Great Eastern Life Assurance



Mr Bruce de Broize

Regional Head of Distribution,
Asia, Generali



**Mr Benedicto "Benedict"
C Sison**

President, Philippine Life Insurance
Association

CEO, Sun Life Philippines



Mr Calvin Lee

President, Financial Services Managers
Association, Singapore

Financial Services Director, AXA Insurance



Mr Benjamin Ang

Editor, *Asia Advisers Network*



Mr Davey Lee

Vice President (Membership),
The Life Underwriters Association of Hong Kong

Senior Regional Director,
Prudential Hong Kong

THE JUDGES



Mr Edward Moncreiffe

Governing Committee Member,
The Hong Kong Federation of Insurers



Mr Jensen Siaw

Chief Motivational Speaker,
Jensen Siaw International
(SPEAK For Life Group)



Ms Gina Birchall

Chief Operating Officer,
LIMRA and LOMA



Mr Jerome Matrundola

CEO, Life and Health, Asia Pacific,
PartnerRe



Mr James HC Liu

President,
Insurance and Financial Practitioners
Association of Taiwan (IFPA)

Chairman, PHEW Inc



Mr Joe Cheng

CEO,
Group Agency Distribution, AIA Group



Ms Jeanette Lim

President, Singapore Insurance Institute
Regional Head, Agency Development &
Incentives, Chubb Asia Pacific



Mr Keith Richards

Managing Director of Engagement,
The Chartered Insurance Institute
CEO, Personal Finance Society

THE JUDGES



Ms Laura Hoi

Zone Chair, South East Asia, Million Dollar Round Table (MDRT), Membership Communications Committee (MCC)

Private Wealth Consultant
Prudential Assurance Company Singapore



Mr Mark Saunders

Group Chief Strategy & Corporate Development Officer, AIA Group



Mr Leong Sow Hoe

President, IFPAS

Senior Financial Services Director, Prudential Assurance Company Singapore



Mr Paul McNamara

Editor, *Asia Insurance Review*



Mr Leopold Joseph O. Janer

President, The Professional Insurance and Financial Advisors Association of the Philippines (PIFAAP)



Mr Richard Vargo

Managing Director, Bancassurance, DBS Bank Ltd



Mr Mark O'Dell

CEO, Life Insurance Association of Malaysia



Mr Rohit Nambiar

CEO, AXA AFFIN Life Insurance

THE JUDGES



Mr Rotha Chan

Chief Agency Officer,
Manulife Cambodia



Mr Shiv Maheshwari

Director and Head - Agency,
Max Life Insurance



Mr Sara Lamsam

CEO,
Muang Thai Life Assurance



Mr Stephen Appleyard

Chief of Distribution Hub, AXA Asia



Ms Shalini Pavithran

CEO,
The Malaysian Insurance Institute &
The ASEAN Insurance Research & Training
Institute



Ms Yvonne Tay

Head of Southeast Asia, Business
Development, SCOR Global Life



Asia Advisers Network

The Trusted Insurance Advisers Network

- Dedicated online platform to meet the information needs of advisers and agency leaders
- Expert content from the best advisers and agency leaders
- Latest industry news and trends

www.AsiaAdvisersNetwork.com

Eligibility

- Entries and nominations are open to all relevant candidates operating in any markets in Asia.
- Participation in more than one category is allowed.

Application requirements

- All entries must be in English and submitted by 31 March 2020.
- Download the application form at www.AsiaAdvisersNetwork.com/awards
- Submission may be done online at www.AsiaAdvisersNetwork.com/awards Or by email to lifearwards@asiainsurancereview.com.
- All submissions should:
 - Specifically address each criterion and must be backed by examples. The judging panel reserves the right to only consider applications that separately address each criterion in the selected award category.
 - Not exceed 1,200 words. The judges will not read beyond the word limit.
 - All write-ups should consist of text only. Visuals and pictures should be appended separately as supporting documents/attachments (see below).
- Supporting documents/attachments:
 - Should be included to back up assertions made in the submissions
 - Shall be limited to four pages. These will not constitute part of the word count.
 - May include client testimonials, official production records, proof of service to association/industry/society, academic qualifications, proof of activities and improvements.

Nominations

Self-nominations

If you are nominating yourself or your own company, using the criteria for guidance, explain in not more than 1,200 words why you or your company should win the award. Submit your entries by 31 March 2020.

Third-party nominations

If you are nominating another individual or company, submit a 300-word statement summarising why the nominee would be a worthy recipient of the award by 23 March 2020. If the nomination is shortlisted, the Awards Administrators will contact the nominee and invite them to submit a full application.

Judging

- The Judging Panel comprises eminent leaders and insurance professionals from the industry.
- There will be two rounds of judging by the Panel: the first is by remote-scoring to select the finalists; the second will be a meeting of Judges to deliberate and select the winners by secret ballot.
- The Judging Panel's verdict is final.
- The judging process will be audited by an independent auditor.
- The organisers reserve the right to publish information of winning entries given at nomination.
- The results will be kept confidential and winners will only be announced at the Gala Awards Dinner on 27 July 2020 in Kuala Lumpur, Malaysia.

THE CATEGORIES

INSURANCE AGENT OF THE YEAR

For the tied-agent who has demonstrated an outstanding performance track record, expert knowledge, placing the interests of clients first and service to the industry.

CRITERIA

- Focus on what was done in 2019.
- What makes you unique compared to other agents?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2019 - MDRT, company awards, industry awards?

FINANCIAL ADVISER OF THE YEAR

For the adviser from a FA firm or bank who has demonstrated an outstanding performance track record, expert knowledge, placing the interests of clients first and service to the industry.

CRITERIA

- Focus on what was done in 2019.
- What makes you unique compared to other advisers?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2019 - MDRT, company awards, industry awards?

ROOKIE INSURANCE AGENT OF THE YEAR

For the agent or adviser with fewer than three years of industry experience, who has demonstrated an outstanding performance track record, expert knowledge, placing the interests of clients first and service to the industry.

CRITERIA

- Provide a brief background on immediate past career and the reasons and motivations in making the switch to the insurance industry.
- Focus on what was done in 2019.
- What makes you unique compared to other advisers or agents?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2019 - MDRT, company awards, industry awards?

INSURANCE AGENCY LEADER OF THE YEAR

For the agency leader who has demonstrated a high level of group production and recruitment, strong leadership qualities with systems in place, commitment to professionalism and service to the industry.

CRITERIA

- Focus on what was done in 2019.
- What makes you unique compared to other agency leaders?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2019 - number of managers promoted, number of MDRT producers, number of new agents/advisers, company awards, industry awards?

THE CATEGORIES

ROOKIE INSURANCE AGENCY LEADER OF THE YEAR

For the agency leader with fewer than five years of managerial experience, who has demonstrated a high level of agency production and recruitment, strong leadership qualities with systems in place, commitment to professionalism and service to the industry.

CRITERIA

- Focus on what was done in 2019.
- What makes you unique compared to other agents?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2019 - MDRT, company awards, industry awards?

DIGITAL AGENT/AGENCY LEADER OF THE YEAR

For the digitally-savvy agent/agency leader who is leveraging the power of social media and technology to enhance the image of the industry, provide value to clients and consumers-at-large and/or increase productivity.

CRITERIA

- Focus on what was done in 2019.
- What are the examples and results of what you have done on the digital front?
- How has digital initiatives driven your business?
- Your performance in 2019 as an agent/agency leader?

INSPIRATIONAL AGENT/LEADER OF THE YEAR

For the agent/leader who is an inspiration to others in the industry through achieving personal breakthrough despite the odds, going beyond to help others in the industry to attain success, exceeding expectations in serving clients or/and serving the underprivileged in society with passion through CSR.

CRITERIA

- Focus on what was done in 2019.
- Why do you think - or why do others think - you are an inspiration?
- What are some of the key initiatives, examples and results of your CSR work?
- What are the odds you overcame to achieve success? How have you selflessly inspired other agents/managers to success or helped your clients?

LIFETIME ACHIEVEMENT

For the agent/leader who has more than 30 years of service to the industry and has made outstanding long-term contribution to enhancing the professionalism and image of the agency distribution force both company-wide and industry-wide.

CRITERIA

- How have you contributed towards the quality and professionalism of the agency force by playing key roles in developing agents company-wide and industry-wide?
- How have you championed the industry by continually enhancing the image of insurance industry and agency force?
- Are you a consistent high performer who enjoys the respect and admiration of your peers in the industry?

THE CATEGORIES

BANK PARTNER OF THE YEAR

For the bank partner that has demonstrated placing importance on the risk or wealth management needs of their clients and has worked in close partnership with the insurer in meeting these needs.

CRITERIA

- Focus on what was done in 2019.
- What makes your partnership stand out from others?
- What are the examples of key wins achieved as a result of this true partnership?
- How did the partnership perform in 2019?

INSURTECH OF THE YEAR

For the InsurTech start-up or technology provider with the best technology initiative, either point-of sales system or backend technology, to assist and enable agents in the course of their work.

CRITERIA

- Focus on what was done in 2019.
- How does the technology you provide help agents or advisers in the course of their work?
- How unique or innovative is your initiative?
- What evidence is there to show the improvements in results attained from using your technology?

DIGITAL TRANSFORMATION OF THE YEAR

For the insurance company that successfully launched a digital transformation initiative in its operations, whether consumer-facing or in support of agents, to assist and enable advisers in the course of their work.

CRITERIA

- What was the digital transformation initiative launched in 2019?
- How does the digital transformation initiative help agents or advisers in the course of their work?
- How unique or innovative is your initiative?
- What evidence is there to show the improvements in results attained from the initiative?

YOUNG EXECUTIVE OF THE YEAR

For the insurance executive under 40 years of age who has championed the interests and importance of advisers or agents with dedication.

CRITERIA

- Focus on what was done in 2019.
- How have you gone out of your way to enhance the interest and importance of advisers or agency distribution channel in your company and/or industry?
- How have you equipped agents or advisers with the necessary skills and expertise to continue to thrive in the changing multi-channel environment?
- What makes you stand out compared to other young executives?

THE CATEGORIES

EXECUTIVE CHAMPION OF THE YEAR

For the CEO or corporate executive who has championed the interests and importance of advisers or agents with dedication.

CRITERIA

- Focus on what was done in 2019.
- How have you gone out of your way to enhance the interests and importance of the advisers or agency distribution channel in your company and/or industry?
- How have you equipped agents or advisers with the necessary skills and expertise to continue to thrive in the changing multi-channel environment?
- What makes you stand out compared to other executives?

INSURANCE COMPANY OF THE YEAR

For the life insurance company that has an agency force that sets the professional standards for other insurers to measure against, and continues to invest in and support its agency force to thrive in the changing multi-channel environment.

CRITERIA

- Focus on what was done in 2019.
- How are you helping your agents to enhance their professionalism, expertise and relevance in a multi-channel distribution world?
- What indicators are there to show how your agency force stands out from the rest?

ORGANISER

ASIA INSURANCE REVIEW

Asia Insurance Review (AIR) was launched in January 1991 to meet the information needs of insurance practitioners in Asia in particular and the rest of the world in general. It quickly became the premier and comprehensive professional regional insurance magazine, read by all the key decision makers and readers in the insurance industry in Asia. AIR remains the voice of the insurance industry of Asia over these 29 long years where change is the very essence of the game in town. It is more than a magazine and remains a strategic partner of the insurance industry even today as the world gets more Asia-centric.

AIR remains the trusted source of reliable up-to-date news and developments in the market with its high quality editorial content. AIR is the official media partner of the following events:

- Asean Insurance Congress
- Asia Actuarial Conference (AAC);
- East Asian Insurance Congress (EAIC);

- Global Insurance Forum (GIF);
- Singapore International Reinsurance Conference (SIRC); and
- Pacific Insurance Conference (PIC).

AIR is also the Permanent Observer of the Asean Insurance Council, the Secretariat for the Reinsurance Brokers' Association of Singapore, as well as the Risk and Insurance Management Association of Singapore.

AIR launched the Asia Insurance Industry Awards to recognise and salute excellence in the insurance industry since 1997. They also launched the Australia and New Zealand Insurance Industry Awards in 2004 and The Trusted Life Agents Awards. These are our conscious attempts to promote the industry's move towards higher standards and greater professionalism.

AIR grows from strength to strength and looks forward to serving the market moving forward.

www.asiainsurancereview.com

ORGANISER



Asia Advisers Network
The Trusted Insurance Advisers Network

Asia Advisers Network (AAN) is a dedicated online platform meeting the information needs of advisers and agency leaders. AAN reports on the latest industry news, development and expert content from the best minds in the industry. This is done through multi-media channels to help advisers and agency leaders stay at the forefront of trends and thrive in the era of fintech and insurtech.

Launched by the region's premier insurance publication Asia Insurance Review, AAN is part of its commitment and continuous efforts to serve the insurance industry in Asia.

AAN aims to help raise the bar of advisers and agency leaders, and also showcase the excellent work that they do.

www.asiaadvisersnetwork.com

STRATEGIC PARTNER



AIA Group Limited and its subsidiaries (collectively "AIA" or the "Group") comprise the largest independent publicly listed pan-Asian life insurance group. It has a presence in 18 markets in Asia-Pacific - wholly-owned branches and subsidiaries in Hong Kong, Thailand, Singapore, Malaysia, China, Korea, the Philippines, Australia, Indonesia, Taiwan, Vietnam, New Zealand, Macau, Brunei, Cambodia, a 97 per cent subsidiary in Sri Lanka, a 49 per cent joint venture in India and a representative office in Myanmar.

The business that is now AIA was first established in Shanghai almost a century ago in 1919. It is a market leader in the Asia-Pacific region (ex-Japan) based on life insurance premiums and holds leading positions across the majority of its markets. It had total assets of US\$221 billion as of 30 June 2018.

AIA meets the long-term savings and protection needs of individuals by offering a range of products and services including life insurance, accident and health insurance and savings plans. The Group also provides employee benefits, credit life and pension services to corporate clients. Through an extensive network of agents, partners and employees across Asia-Pacific, AIA serves the holders of more than 32 million individual policies and over 16 million participating members of group insurance schemes.

AIA Group Limited is listed on the Main Board of The Stock Exchange of Hong Kong Limited under the stock code "1299" with American Depositary Receipts (Level 1) traded on the over-the-counter market (ticker symbol: "AAGIY").

www.aia.com

CO-ORGANISER



Since 1916, LIMRA has helped insurance and financial services leaders identify best industry practices, offering forums for discussion and to hear experts weigh in on the critical issues facing our members. Today, we support more than 850 members worldwide through our study groups, committees, and conferences. At our core, we are a research organisation, offering actionable, credible insight into insurance and retirement trends. From sales and distribution benchmarking and product utilisation to in-depth analysis of consumer behaviour, carrier and advisor use of social media and technology, and regulatory changes, LIMRA's research programme continues to evolve and grow as our members' needs change.

Through the knowledge attained from our research and analysis, we have developed comprehensive assessment and training programmes for financial professionals and field managers to help them achieve their business goals. Our solutions enable you to attract more top talent, evaluate and engage high-potential candidates, and boost sales effectiveness at all stages of the career. After 100 years, we are not resting on our past successes. Our research and training programmes continue to evolve to address the challenges that financial services leaders face today - using advances in technology and methodology to offer more in-depth analysis of market trends. As such, LIMRA remains the trusted source for industry knowledge.

www.limra.com

Like and follow us to stay updated on the latest news in the industry!



An initiative by **ASIA INSURANCE REVIEW**



2019 ROLL OF HONOUR



ROOKIE INSURANCE AGENT OF THE YEAR
SHIU LING PO | AIA INTERNATIONAL, HONG KONG



INSURANCE AGENT OF THE YEAR
CHIA-CHUN LIU | CATHAY LIFE, TAIWAN



FINANCIAL ADVISER OF THE YEAR
ISABELLE OH CHIN IAN | AIA FINANCIAL ADVISERS, SINGAPORE



ROOKIE INSURANCE AGENCY LEADER OF THE YEAR
JASON CHU | SUN LIFE HONG KONG



INSURANCE AGENCY LEADER OF THE YEAR
CHOW WING KAI | AIA INTERNATIONAL, HONG KONG



DIGITAL AGENT/AGENCY LEADER OF THE YEAR
CALVIN LEE | AXA INSURANCE, SINGAPORE

2019 ROLL OF HONOUR



INSPIRATIONAL AGENT/LEADER OF THE YEAR

SUSANNA CHAN | SUN LIFE HONG KONG



LIFETIME ACHIEVEMENT

DR MARY CHEN MING LI | AIA SINGAPORE



INSURTECH OF THE YEAR

GOALSMAPPER | SINGAPORE



BANK PARTNER OF THE YEAR

TECHCOMBANK | VIETNAM



YOUNG EXECUTIVE OF THE YEAR

SABRINA ONG | AIA FINANCIAL INDONESIA



EXECUTIVE CHAMPION OF THE YEAR

SARA LAMSAM | MUANG THAI LIFE, THAILAND



INSURANCE COMPANY OF THE YEAR

AIA | SINGAPORE





5TH ASIA TRUSTED LIFE AGENTS & ADVISERS AWARDS 2020 Nomination Form

Full Nomination (by 31 March 2020)

If you are nominating your own company or yourself:

Name of company

Your name

Designation

Address

Tel

Email

Third-party nomination (by 23 March 2020)

If nominating another company or individual:

Name of company

Individual's name

Designation

Contact person

Address

Tel

Email

Nominated by (optional)

Name

Tel

Email

Categories

(please tick):

- Insurance Agent of the Year
- Financial Adviser of the Year
- Rookie Insurance Agent of the Year
- Insurance Agency Leader of the Year
- Rookie Insurance Agency Leader of the Year
- Inspirational Agent/Leader of the Year
- Digital Agent/Agency Leader of the Year
- Lifetime Achievement
- Bank Partner of the Year
- InsurTech of the Year
- Digital Transformation of the Year
- Young Executive of the Year
- Insurance Company of the Year
- Executive Champion of the Year

Entries can be submitted via:

email: lifearwards@asiainsurancereview.com or

online: www.AsiaAdvisersNetwork.com/awards

Table Bookings:

If you would like to participate in the celebration of the Trusted Life Agents and Advisers at the Gala Dinner on 27 July in Kuala Lumpur, Malaysia or host a table at this industry networking event, seats and tables are available for booking at US\$200 per person or US\$2,000 per table of 10.

- Yes, I would like to book for _____ persons.
- Yes, I would like to book _____ tables.

For enquiries, please contact

Ms Ann Tay at ann@asiainsurancereview.com

Qualifying Period: 1 January - 31 December 2019