

6TH

ASIA TRUSTED LIFE AGENTS & ADVISERS AWARDS 2021

NOMINATION

HOW TO ENTER

DEADLINE **8 MARCH** (THIRD-PARTY NOMINATIONS) **22 MARCH** (FULL NOMINATIONS) | JUDGING DAY **6 MAY** |

AWARDS CEREMONY **7 JULY**

Organisers





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Strategic Partner

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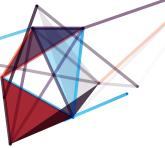






www.AsiaAdvisersNetwork.com/awards





Organisers





Co-Organiser

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ORGANISER'S MESSAGE



The best of the best

2020 was a complete game changer and a nightmare to many but agents and advisers took the challenge to rise higher to demonstrate their value with greater customer care.

Many markets in Asia saw surges in life premiums, too. Insurance became more appreciated as many life insurers tried to be flexible and more sympathetic towards policyholders in such a challenging time.

This has made us more determined to go ahead with the launch of the 6th Asia Trusted Life Agents & Advisers Awards. There are just too many stars shining out there, and we hope to cast our net even wider to recognise the best of the best. This time, we are even expanding the reach to look at agents who promote group health and employee benefits, too.

We are truly honoured and gratified in serving the agents and advisers segments of the life business sector, having seen the dynamic role they play even in the COVID-19 pandemic. They are an integral and indispensable part of the value chain.

We believe that they go beyond the call of duty with a great heart, customer care and corporate

social responsibility. To us, they hold the beacon promoting the brand and trust of insurance in society. As our Patron Mark Tucker said five years ago, agents are still very much the unsung heroes of the industry.

Likewise, we also want to recognise companies and insurance executives who work so hard behind the scenes to enable their agents to excel and shine even in the digital and work-from-home era.

The Awards – organised by Asia Advisers Network and Asia Insurance Review, with co-organiser LIRMA and strategic partner AIA – continues with a stringent judging process that is independently audited by EY, and an esteemed judging panel of some 30 CEOs, senior executives, heads of associations and subject matter experts.

We remain committed to the search for excellence as our CSR for the industry we love and honour. So keep the entries coming. Log on to www.AsiaAdvisersNetwork.com/awards to enter. All it takes is for you to believe in yourself.

Dare yourself to shine.



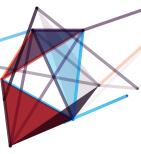
Sivam Subramaniam

Adviser, Asian Affairs, Beacon International Group



Benjamin Ang

Founding Editor Asia Advisers Network



CO - ORGANISER'S MESSAGE

True leaders stand out in times of crisis

IMRA is honoured to co-organise the 6th Asia Trusted Life Agents & Advisers Awards 2021, which recognises accomplished agents and advisers, and their commitment to serving their customers.

As a research-led organisation, LIMRA's purpose is to advance the financial services industry by empowering our members with knowledge, insights, connections, and solutions. This past year was no exception. When the pandemic hit, we moved quickly to provide the industry with the tools and information they needed to address these new industry challenges and allow companies and agents alike to continue protecting the financial security of the clients they serve.

While a rapidly changing industry was already top of mind for all of us as we started 2020, the unprecedented year pushed our industry to change faster than ever. Companies had to move quickly to adapt to new remote working environments, stop in-person meetings due to lockdowns, and learn new technologies that were not part of our previous

practice. This created immediate challenges for agents and advisers to connect with their customers.

Despite these challenges, we saw agents and advisers successfully adapting to the new and changing environment, continuing to find new and innovative ways to engage with their customers and help alleviate their financial fears during this extraordinary time.

It is in times of crisis when true leaders stand out from the rest and are able to show strength, determination, and inspire others to do better and to do more. It is important to recognise those individuals who go above and beyond every day to help customers achieve financial security.

I encourage you to nominate an agent or adviser who represents the best in the industry — to celebrate the achievements of all that has been positive in a world that has experienced so much recent chaos.



David Levenson

President & CEO, LIMRA, LOMA and LL Global

Recognising the immense contribution of agents and advisers

2020 has been a challenging year; we have faced both public health and economic crises as a result of the spread of the COVID-19 virus.

First of all, I hope you and your families have been – and continue to be – safe and well.

The difficulties we have faced over the last year have underlined the critical role played by financial services in our economies, both in supporting customers and in creating a bridge to a post-COVID world. Insurance has been central to this, due to the requirement for long-term capital, the need to manage new kinds of risk and the acceleration of digitalisation.

For many years, agents and advisers have led the way in the use of innovative products and the harnessing of new technologies for sales and customer service. As our industry and society adapt to the new circumstances, the inspiration and example of agents and advisers will be more important than ever.

Agents and advisers will remain at the forefront of initiatives that link life insurance to wellbeing, increasing coverage and closing the protection gap. They will offer ever more innovative products and technologies and will strive to find new ways to better serve customers. As a consequence, agents and advisers will continue to go from strength to strength and will cement their importance to the future of our industry.

These awards recognise the immense contribution that agents and advisers make to customers and to the communities in which we work and live. I would like to thank Asia Insurance Review and Asia Advisers Network for helping us to celebrate the very best of them.



Mark Tucker

Group Chairman, HSBC



THE JUDGES



Alison Salka
Senior Vice President and Director of Research,
LIMRA, LOMA and LL Global, Inc.



Andy M Law

President,
Financial Services Managers Association (FSMA)





Anurag Gupta

Senior Vice President, Head, Agency Program,
Transformation and Growth Initiative,
Max Life Insurance Company Limited



Anusha Thavarajah CEO, Life & Health, Asia Pacific, Allianz





Banyong Witayaweerasak Chairman, APFinSA



Benedict Sison

President,
Philippine Life Insurance Association (PLIA)

CEO and Country Head, Sun Life Philippines

THE JUDGES



Benjamin Ang
Founding Editor,
Asia Advisers Network



E F

Bruce de Broize Regional Head of Distribution, Generali Asia



F

Carlos Lee Seng Teck

President (2020/2021), Insurance and Financial
Practitioners Association of Singapore (IFPAS) &

Co-Chairman 18th Asia Pacific Life Insurance Congress (APLIC) 2022 Singapore



Davey Lee

President (2021), The Life Underwriters Association of Hong Kong

Senior Regional Director, Prudential Hong Kong Limited





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



Jensen Siaw

Chief Motivator & CEO, Jensen Siaw International (JSI)



THE JUDGES



Jeslyn Tan

President, Singapore Insurance Institute (SII)

Vice President, Head of Consulting & Development, Independent Distribution Partners, Chubb Overseas General



Jude Gomes

CEO, Union Assurance



Keith Richards

CEO, Personal Finance Society

Chief Membership Officer, Chartered Insurance Institute



Laura Hoi

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

Private Wealth Consultant, Prudential Assurance Company Singapore



Mark O'Dell

CEO, Life Insurance Association of Malaysia



Mark V. T. Saunders

Group Executive, Group Chief Strategy & Corporate Development Officer, AIA Group Limited

THE JUDGES



1

Patrick Peck

Managing Director, Regional Agency / FA & Bancassurance,
Great Eastern Life Assurance Co. Ltd



Paul Arrowsmith



Senior Vice President and President, International, LIMRA, LOMA, and LL Global, Inc.



Paul McNamara

Editorial Director,

Asia Insurance Review



Rishi Srivastava
CEO,
Group Agency Distribution, AIA Group



Rotha Chan CEO, FWD Cambodia



Sara Lamsam

President and CEO,

Muang Thai Life Assurance Public Company
Limited (MTL)



THE JUDGES



Selina Lau

Chief Executive,
The Hong Kong Federation of Insurers



Shalini Pavithran
CEO,
Malaysian Insurance Institute, ASEAN Insurance
Training & Research Institute



Stephen Appleyard
Chief of Distribution Hub,
AXA Asia



Steven Fong General Manager, Distribution, Sun Life Hong Kong Limited



Willison So Yu

2020 National President,
Life Underwriters Association of the Philippines



Eligibility

- Entries and nominations are open to all relevant candidates operating in any markets in Asia.
- Participation in more than one category is allowed.
- The qualifying period for consideration is 1 January 2020 31 December 2020.

Application requirements

- Visit www.AsiaAdvisersNetwork.com/awards for more information
- All entries must be in English and full nominations with supporting documents submitted by 22 March 2021.
- Nominations must be submitted at www. AsiaAdvisersNetwork.com/awards via the online form
- All submissions should provide:
 - Your background and past achievements (up to 150 words)
 - Your achievements in 2020 (up to 150 words)
 - Specifically address each criterion, backed by examples and supporting documents.
 (500 to 700 words)
 - The judging panel reserves the right to only consider applications that separately address each criterion in the selected award category.
 - The judging panel reserves the right to assess entries up to the indicated word limit above.
 - 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.
- If participating in more than one category, the nomination write-up must be relevant and tailored to answering the criteria of the different categories. We reserve the right to consider the nomination for only one category should the write-ups be the same.

Nominations

Self-nominations

If you are nominating yourself or your own company, submit your entries with the full write-up and supporting documents via the online form by 22 March 2021.

Third-party nominations

If you are nominating another individual or another company, submit a 300-word statement summarising why the nominee would be a worthy recipient of the award by 8 March 2021. 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 Virtual Awards Presentation Ceremony on 7 July 2021.

If you have further questions, email lifeawards@asiainsurancereview.com



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 2020.
- What makes you unique compared to other agents?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2020 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 2020.
- What makes you unique compared to other advisers?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2020 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 2020.
- 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 2020 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.

- Focus on what was done in 2020.
- What makes you unique compared to other agency leaders?
- In what ways did you contribute to your company, industry or society?
- Your performance in 202<mark>0 number of managers promoted, number of MDRT producers, number of new agents/advisers, company awards, industry awards?</mark>





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 2020.
- What makes you unique compared to other agency leaders?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2020 number of managers promoted, number of MDRT producers, number of new agents/advisers, company awards, industry awards?



EMPLOYEE BENEFITS CONSULTANT OF THE YEAR

For the Employee Benefits Consultant who has demonstrated expertise in providing customised solutions for organisations of different sizes with different talent management needs.

CRITERIA

- Focus on what was done in 2020
- In what ways have you demostrated your expertise as an Employee Benefits Consultant?
- How has your work helped different companies meet their different needs?
- Your performance in 2020 as an Employee Benefits Consultant?



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 2020.
- What are the examples and results of what you have done on the digital front?
- How have digital initiatives driven your business?
- Your performance in 2020 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.

- Focus on what was done in 2020.
- 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 35 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 the insurance industry and agency force?
- Are you a consistent high performer who enjoys the respect and admiration of your peers in the industry?

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 2020.
- 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 2020?

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 2020.
- 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.

- What was the digital transformation initiative launched in 2020?
- 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 2020.
- How have you gone out of your way to enhancing 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?



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 2020.
- How have you gone out of your way to enhancing 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?



EMPLOYEE BENEFITS PROVIDER OF THE YEAR

For the Employee Benefits Provider with wide-ranging customisable solutions, to cater to the needs of organisations of different sizes with different talent management needs

CRITERIA

- Focus on what was done in 2020
- How are you helping your Employee Benefits Consultants in serving their corporate clients?
- What indicators are there to show that your Employee Benefits Solutions and Consultants stand out from the rest?



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.

- Focus on what was done in 2020.
- How are you helping your agents enhance their professionalism, expertise and relevance in a multichannel distribution world?
- What indicators are there to show how your agency force stands out from the rest?





Beacon International Group, Ltd.

Beacon International Group, Ltd. is a private company specializing in insurance and financial services media and related resources including the world's leading media platforms: Business Insurance (USA), Commercial Risk (UK), Workers Comp Central (USA), Asia Insurance Review (serving Asia from Singapore), Middle East Insurance Review and Insurance Advocate (New York). Beacon has drawn top talent together into a new working formula that provides the highest level of carefully edited, wisely and reliably curated intelligence to the world's insurance and risk management professionals, fulfilling the Company's motto "Leadership for Leaders ...since 1889". This date refers to the birth of Beacon's Insurance Advocate, believed to be the oldest continually published insurance medium in the United States, having been formed originally in 1853 and ten again in 1889 and published continually ever since. Beacon produces television programming, directories, books and guides, as well. The media are all long established and have among the largest audience of "eyes" each month of any insurance business publishing group.



s we approach 30 years in the business and our continued dedicated service to the region's insurance industry, Asia Insurance Review (AIR) is still hailed as the "Must-read market leader", and "the Voice of Asia".

As the official media partner of all the leading industry events in Asia, including the East Asian Insurance Congress (EAIC), the Pacific Insurance Conference (PIC), Asian Actuarial Conference (AAC) and the Singapore International Reinsurance Conference (SIRC), while being the Permanent Observer of the ASEAN Insurance Congress, AIR still remains relevant and a powerhouse for regional content for the industry. In addition to our wide host of high-level conferences, including flagship events such as the India Rendezvous, CEO Summit, CFO Summit, China Rendezvous and the Takaful Rendezvous, AIR also seeks to engage market leaders and our clients through webinars and roundtables on topics of importance to our readers.

Together with its sister publication, Middle East Insurance Review (MEIR), AIR continues to be in a position of strength, as the only magazine globally reaching out to the Middle East, Africa and Asia, and the rest of the world in general. Our dedication to support the industry's march towards excellence, utmost professionalism and growth continues to be our main focus.

www.asiainsurancereview.com





sia 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

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 the industry. Today, we support more than 700 members in 53 countries 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. Our mission is simple: to advance the financial services industry by empowering our members with knowledge, insights, connections, and solutions.

www.limra.com



STRATEGIC PARTNER



IA 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 Mainland China, Hong Kong SAR(4), Thailand, Singapore, Malaysia, Australia, Cambodia, Indonesia, Myanmar, the Philippines, South Korea, Sri Lanka, Taiwan (China), Vietnam, Brunei, Macau SAR(5), New Zealand, and a 49 per cent joint venture in India.

The business that is now AIA was first established in Shanghai more than 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\$291 billion as of 30 June 2020.

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 36 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



SPONSORS_



About Allianz in Asia

sia is one of the core growth regions for Allianz, characterized by a rich diversity of cultures, languages and customs. Allianz has been present in the region since 1910, when it first provided fire and marine insurance in the coastal cities of China. Today, Allianz is active in 14 markets in the region, offering its core businesses of property and casualty insurance, life, protection and health solutions, as well as asset management. With its more than 36,000 staff, Allianz serves the needs of more than 21 million customers in the region across multiple distribution channels and digital platforms.

www.allianz.com



The Union Assurance Brand

or over three decades, the trajectory of the Union Assurance brand has encompassed the concepts of 'care' in caring for and covering lives and 'trust' in winning the trust of Sri Lankans as a reliable brand that is transparent in its dealings, offering convenience to its customers, and being respectful towards its stakeholders.

Today the brand has evolved to inspire and support the Sri Lankan dream, centred on the slogan 'Your life, Our strength.' With an aspiration to empower people, the Union Assurance brand is positioned to 'protect lifestyles,' ensuring life is enjoyed to its fullest, despite any unforeseeable challenges; 'protect relationships,' by insuring lives and the future of loved ones against losses; and 'protecting ambitions' by supporting the dreams and goals of everyone who aspires to be the best version of themselves.

www.unionassurance.com

2020 ROLL OF HONOUR

ROOKIE INSURANCE AGENT OF THE YEAR

Joyce Chan
Prudential Assurance Company, Singapore

ROOKIE INSURANCE AGENCY LEADER OF THE YEAR

Lahiru Maduranga Softlogic Life Insurance PLC, Sri Lanka

FINANCIAL ADVISER OF THE YEAR

Wilfred Wong AIA Financial Advisers, Singapore

BANK PARTNER OF THE YEAR

Saigon Commercial Bank, Vietnam

DIGITAL AGENCY LEADER OF THE YEAR

Wave Chow AIA International Limited, Hong Kong

INSURTECH OF THE YEAR

GetArrange.com

DIGITAL TRANSFORMATION OF THE YEAR

PT Asuransi Allianz Life Indonesia

INSPIRATIONAL AGENCY LEADER OF THE YEAR

Wong Ching Lih AIA Bhd., Malaysia

LIFETIME ACHIEVEMENT AWARD

Lachman B. Balani Sun Life Hong Kong Limited

INSURANCE AGENCY LEADER OF THE YEAR

Benny Chow
AIA International Limited, Hong Kong

INSURANCE AGENT OF THE YEAR

Divya Tusnial
TATA AIA Life Insurance Co. Ltd, India

YOUNG EXECUTIVE OF THE YEAR

Jason Chou Sun Life Hong Kong Limited

INSURANCE COMPANY OF THE YEAR

Sun Life Hong Kong Limited

EXECUTIVE CHAMPION OF THE YEAR

Rakesh Sharma
TATA AIA Life Insurance Co. Ltd, India