



# 6th Asia Trusted Life Agents & Advisers Awards 2021

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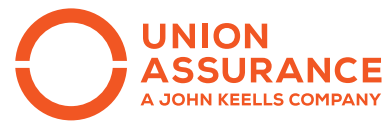
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# CONTENTS

**2**

Messages

**6**

The Judges

**15**

Rookie Insurance Agent  
of the Year

**16**

Rookie Insurance Agency  
Leader of the Year

**17**

Financial Adviser  
of the Year

**18**

Bank Partner  
of the Year

**19**

Digital Agent  
of the Year

**20**

Employee Benefits  
Consultant of the Year

**21**

InsurTech of the Year

**22**

Digital Transformation  
of the Year

**24**

Employee Benefits  
Provider of the Year

**25**

Inspirational Leader  
of the Year

**26**

Insurance Agency  
Leader of the Year

**27**

Lifetime Achievement  
Award

**28**

Insurance Agent  
of the Year

**30**

Young Executive  
of the Year

**31**

Insurance Company  
of the Year

**32**

Executive Champion  
of the Year

**34**

Partners

**38**

The Finalists

## Going the extra mile

**A**s the founding patron of the Asia Trusted Life Agents & Advisers Awards, it is a great pleasure to see these awards enter their sixth year, particularly in these challenging times.

COVID-19 has brought the world together with a common focus – health and wellness. As this virtual awards ceremony demonstrates, agents and advisers are accessing new products, digital solutions and thinking outside of the box to ensure the wellbeing of their clients. I am delighted to see how agents and advisers are helping their clients to live healthier lives by embracing technology and innovation to increase coverage and help to close the protection gap.

As the world shifts its focus to repairing, rebuilding and re-energising economies, the role of financial services has never been more critical. Insurance is central to this due to, among other things, the requirement for long-term capital and the need to manage new kinds of risk. The last year has demonstrated the tenacity and agility of the insurance industry to overcome unprecedented challenges. So, it is even more important we recognise and celebrate the significant work and contribution of agents and advisers who are pushing the boundaries of excellence in the “new normal”.

In a particularly challenging year, I would like to congratulate all our

finalists, and thank them for their commitment to the industry, and the immense contribution they make to customers and to the communities in which we work and live. I would also like to acknowledge the prestigious panel of judges for their hard work and the tough decisions required to select the winners who will be revealed tonight.

My thanks to *Asia Insurance Review* and *Asia Advisers Network* for continuing to recognise and celebrate excellence.

And finally, hearty congratulations to *Asia Insurance Review* for reaching their 30th anniversary milestone of serving the market. It is a great achievement.



**Mark Tucker**  
Group Chairman,  
HSBC

## Saluting the industry agents

**O**n behalf of *Asia Advisers Network* and *Asia Insurance Review*, we are so proud to be hosting the 6th Asia Trusted Life Agents and Advisers Awards (the awards). Especially during this continued pandemic which has pained the world for over a year, it is indeed encouraging to see how agents and advisers have continued to service their clients despite the challenges, despite the lockdowns and think 'outside the box' to ensure their commitment is unfazed.

The role agents and advisers play in the insurance value chain is now even more crucial, given the devastating toll of COVID-19. The need for insurance is now even more important and despite tighter wallets and the recessionary climate, agents have continued full steam ahead to ensure clients are protected.

We salute and congratulate all of them for going the extra mile and for their tenacity.

This is the second year we are hosting the awards as a virtual presentation ceremony. We are determined to showcase these heroes, their courage and commitment to the cause. It is the X-factor and persistence of these agents and advisers that make them stand out and in turn, promote the value of insurance.

To be part of this noble process of recognising them is indeed humbling for us. We thank the distinguished panel of judges, without whom the awards would not hold its prestige. The transparent and legitimate process remains the fortress of strength of the awards, with EY as the independent auditor. We are truly grateful for the support of our patron Mark Tucker, our strategic partner AIA as well as our sponsors, Allianz and Union Insurance for their support, not to mention our co-organiser LIMRA.

We applaud every nominee for their guts to stand forth and be counted. Despite the pandemic,

we received some 280 entries from over 60 companies in 17 markets. The awards are highly sought after and the toughest trophies to bag. So everyone is a winner in our eyes and you are truly respected as the soldiers of the insurance industry.

We hope you stand tall and be proud of your achievements. We cannot wait to see you breaking the ceiling to be even better in your journey from here. The industry depends on you.

We salute all of you and wish you the very best in what we hope will be a post-COVID world.

All the best and stay safe.



**Sheela Suppiah**  
CEO

*Asia Insurance Review,  
Middle East Insurance Review &  
Asia Advisers Network*



# Congratulations to the ambassadors of the industry

I extend my most sincere congratulations to all of you! The individuals and organisations recognised today are outstanding ambassadors for the financial services industry – demonstrating the highest levels of professionalism, knowledge, and commitment.

LIMRA is honoured to take part in celebrating the best and brightest financial professionals in Asia at the 6th Asia Trusted Life Agents & Advisers Awards ceremony. Our mission is to advance the financial services industry by empowering our members with knowledge, insights, connections, and solutions. A key element of this mission, through events like this, is to ensure we applaud those of you who are truly leading this advancement.

Winning this award shows that you have done the difficult and admirable work of earning your clients' trust. You play an essential role in helping them protect their families, making contributions that have a positive impact on your

clients and our industry. Leaders like you shape the evolution of our business, and you should be so proud of all you have achieved.

In reflecting on the past year and the unimaginable challenges it presented, I believe that one consistent theme is how much stronger we all are when we work together. Partnership is the key concept that comes to mind, and it will remain critical to our shared success. It is a valuable foundation in many contexts.

For instance, LIMRA is extremely pleased to partner with Asia Insurance Review in outstanding events such as these awards. We also take seriously the strong partnerships we have built with our member companies around the globe. And certainly, consumers need trusted partnerships with their agents and advisers more than ever before. Through all of these relationships, we have persevered not only to survive, but also to navigate to a better position moving forward.

As we begin to emerge from one of the most trying crises our world has ever faced, I feel great hope and optimism for our future. More than ever, the value of our industry's honourable mission is clear. I know you will continue to give individuals, families, and businesses a powerful sense of financial security. I know you will continue to help people when they need you most. And I know, in the spirit of partnership, together we all will create and experience a brighter tomorrow.

Thank you for the important work you do each day. And once again, congratulations!



**Paul Arrowsmith**  
President,  
International Operations  
LIMRA, LOMA, and LL Global

## Transforming into a lifelong partner and adviser

I would like to congratulate all the agents and advisers that have been recognised at the Asia Trusted Life Agents & Advisers Awards 2021.

I am extremely proud of how you have responded to the ongoing pandemic, including adopting digital technologies, to provide peace of mind to our customers when they needed us the most. It is this professionalism, dedication, and resilience during these challenging times that has made you all winners this year.

It is apparent that with greater health awareness has come an increased appreciation of the demand for insurance protection, providing us with a unique chance to truly transform into agents of change in the communities we serve. Asia needs you more than ever before.

Structural shifts and evolving consumer mindsets present an extraordinary opportunity for you to provide your customers with seamless interactions, with every

experience being hyper-relevant and each recommendation being highly personalised.

Gone are the days when agents and advisers could sell a pre-packaged policy and then move on to the next sales lead. Today, customers demand a partner to be with them at every stage of their health journey: predict, prevent, diagnose, treat and recover.

Leading multinational technology companies took advantage of the initial lockdowns in early 2020 to show the world what outstanding customer service looks like on a day-to-day basis. The life insurance industry must take heed of their example, or it will be left behind.

Ever since I joined the industry, I have held the conviction that insurance had the potential to protect and even bring significant, positive outcomes to people in our communities. Today, our role in meeting our customers' long-term savings and protection needs is more important than ever.

I am positive that with your hard work and with the execution of new technologies, we will engage, monetise, and retain new generations of digitally savvy customers for decades to come.

Once again, congratulations to all the nominees and the winners. Let's continue to fight hard for our communities and serve millions more people across Asia.



**Bill Lisle**

Regional Chief Executive and  
Group Chief Distribution Officer,  
AIA Group

# The Judges



## Alison Salka

Senior Vice President and Director of Member Benefits Research, LIMRA, LOMA, Secure Retirement Institute

Ms Salka joined LIMRA in 2012 and is responsible for driving the strategy and direction of its global research program. She oversees a team of more than 85 professionals in LIMRA's Member Benefits and Research division who conduct benchmark studies, discovery research, and thought leadership designed to help companies better understand industry issues and trends. Ms Salka previously led the retirement research and competitive intelligence team at Prudential and was also a director of retirement research and business analytics at MassMutual. She has a Master's degree from the College of William and Mary and Ph.D. from Vanderbilt University.



## Andy M Law

President, Financial Services Managers Association (FSMA)

Mr Law has been serving as FSMA committee member since 2016. He has served the committee as its honorary secretary, vice presidency for two terms and is recently serving his second term as the president. He also served as education chair and helped to organise the annual learning conference, Singapore Agency Managers' Conference. FSMA's motto is to lead and to serve, and Mr Law, along with the dynamic committee members in FSMA, are committed to walking this journey with its members.

On the agency front, Mr Law is a financial services director (FSD) with AIA Singapore. He is prominent in the employee benefits space, having been featured in Bloomberg magazine four times in 2016-2019 for his district's achievements. His most recent achievement is the AIA Corporate Solutions Top FSD in 2021. He is also a certified financial planner and affiliate of the Society of Trust and Estate Planner.



## Anurag Gupta

National Head, Agency Sales, Max Life Insurance Company Limited

Mr Gupta is the national head-agency sales of Max Life Insurance overseeing agency businesses in India.

Since joining the Max Life group in 2002, he has served in a variety of senior positions across agency, business development, strategy, transformation, product management across life and health insurance business. Prior to moving to insurance, he has worked in telecom and media sector.

He holds an MBA in international business from an Indian university.



# The Judges



## Anusha Thavarajah

CEO, Life & Health, Allianz Asia Pacific

Ms Thavarajah is Allianz's regional CEO, life & health for Asia Pacific. She is responsible for the profit and loss and functional development of Allianz's life & health business in Asia, focused on advancing the segment's strong growth to meet Allianz Asia's long-term strategic priorities in the region. In addition, she is a member of the company's Regional Executive Board, responsible for setting and executing Allianz's growth strategy in Asia, chairperson of Allianz Ayudhya Assurance & Allianz Taiwan Life, vice chairperson of Allianz China Life and is on the boards of Allianz's entities in Malaysia and Philippines.

Ms Thavarajah joined Allianz in December 2019 from AIA, where she was the CEO. In addition to its three main business lines – agency, partnership distribution and corporate solutions, Anusha oversaw AIA Malaysia's takaful, general insurance, pension and asset management, and health services units. Anusha was also the president of the Life Insurance Association of Malaysia, chairperson of the Malaysian Insurance Institute and became the first woman CEO in the AIA Group when she was appointed to head AIA Malaysia in June 2015.

She has almost 30 years' experience in the financial services industry having served in various senior leadership roles in the UK, Hong Kong and Malaysia, and is a fellow of the Institute of Actuaries, United Kingdom and fellow of the Malaysian Insurance Institute.



## Banyong Witayaweerasak

Immediate Past Chairman, APFinSA

Mr Witayaweerasak has served in the Asia Pacific Financial Services Association (APFinSA) as its hon treasurer from 2015 to 2019 and served as chairman of APFinSA during 2019-2021. He is now the immediate past chairman of APFinSA. He has a wealth of experience in the financial industry and has worked in the insurance field for 35 years. He is actively involved in many social activities and projects serving the community in Thailand. At present, he is a senior district manager in AIA (Thailand).

Mr Banyong was in the committee of a public company, Community Pharmacy Public Company, for more than 10 years. He has been invited to serve in education working groups from both the office of Insurance Commission and Thai Life Assurance Association. He is a business columnist for a leading business newspaper in Thailand. He has written many articles about financial and business issues for more than 20 years and he is the author of the book, "Financial Fraud".

He was the president of Thai Association of Insurance and Financial Advisors (THAIFA) from 2009 to 2011. During his term, he revitalised the Fellow Chartered Financial Practitioner (FChFP) course which is now popular among Thai insurance agents. Currently, Mr Witayaweerasak is the advisor to the THAIFA Board. He also serves as a committee member of the International Certification and Standard Board which is a key standing committee of APFinSA, governing the FChFP curriculum.



## Benedict Sison

President, Philippine Life Insurance Association (PLIA) / CEO and Country Head, Sun Life Philippines

Mr Sison is the CEO and country head of Sun Life Financial Philippines. He is also the chairman of the Sun Life Prosperity family of funds, and of Sun Life Foundation.

In addition, he is currently the president of the Philippine Life Insurance Association. Mr Sison received his MBA from the University of California Riverside Graduate School of Management in California, USA, on a full tuition academic scholarship. He was also bestowed the prestigious George W. DuBois Memorial Award for his scholastic achievement. He also has a degree in BS Business Administration from the University of the Philippines, where he graduated with Magna Cum Laude honours. In December 2012, he was honoured by the institution with the Most Distinguished Alumnus Award.

# The Judges



## Bruce de Broize

Regional Head of Distribution,  
Generali Asia

Mr de Broize is the regional head of distribution for Generali Asia based in Hong Kong. He oversees life, health and P&C distribution for Generali's operations across eight markets in Asia, including China, Hong Kong, Thailand, Indonesia, India, Vietnam, Malaysia and the Philippines. He has extensive distribution expertise drawn from over 32 years of international experience in various senior operational distribution management and consulting roles with major life and P&C insurance companies in Asia. As a result, he has a deep knowledge of the Asia market, with over 21 years' experience in the Asia region.

Mr de Broize has played leading roles in developing and growing profitable distribution operations, including distribution start-ups, JVs, M&S, and managing turnarounds in both developed and developing markets across the region. He has extensive hands-on operational distribution management experience in leading large and diverse intermediary distribution operations, including professional independent agencies, strategic partners, partner intermediaries and career agency distribution.

Prior to joining Generali, he was the regional chief distribution officer for AXA Asia, and prior to that regional chief agency officer for AIG in the Asia Pacific region responsible for all agency business, including China.



## Carlos Lee Seng Teck

President (2021/2022), Insurance and Financial Practitioners Association of Singapore (IFPAS) / Co-Chairman, 18th Asia Pacific Life Insurance Congress (APLIC) 2022 Singapore

As the President of IFPAS, Mr Lee oversees the various initiatives by the organisation and is responsible for managing the wellbeing of the Singapore financial advisory industry. Together with his team, he will continue building the association as the national representative of industry practitioners.

IFPAS represents the 18,000 strong group of financial advisers in Singapore. It enforces strictly to ensure a high standard of membership, as well as to protect the public's interests, the institution of life insurance and the institution of insurance and financial services.

Through a very close-knit working relationship with various government agencies like Monetary Authority of Singapore, Prime Minister's Officer, Ministry of Health, Ministry of Culture, Community & Youth, People's Association and many more, the association has garnered incredible support from different stakeholders and insurer companies in Singapore (AIA, Prudential, Great Eastern, Income, Manulife) over the years.



## Davey Lee

President (2021), The Life Underwriters Association of Hong Kong / Senior Regional Director, Prudential Hong Kong Limited

Having been in the insurance arena for more than three decades, Mr Lee has served the industry by taking up the leadership in various industry associations. He has been serving at LUAHK since 2008 and is currently the president of LUAHK. He aims to promote the sustainable development of the industry by serving LUAHK as well as CEPA Business Opportunities Development Alliance and being a committee member of Hong Kong Management Association – Insurance Industry Committee.

In addition, Mr Lee played an active role in the regulatory development of the industry by serving as co-opted and committee member of Insurance Agents Registration Board before the Insurance Authority's takeover in 2019.

# The Judges



## James Liu

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

Mr Liu is senior executive advisor to the FinTech Research Center of the NCC University, cooperating with financial institutions and technology firms in implementing digital transformation, and chairman of IFPA Taiwan, an Asian association of life insurance agents. Previously, he was CEO of AEGON Taiwan, having built the company from scratch to a \$30bn asset company; and expanded into the Asian region.



## Jeslyn Tan

President, Singapore Insurance Institute (SII)

Currently serving as president of the Singapore Insurance Association, Ms Tan is a collaborative and versatile business leader with international and cross-cultural work experience. She has extensive experience in a wide variety of roles within the insurance industry including consulting, distribution, human resources, operations, and customer service. She has a flair for identifying talent for the right role and is passionate about coaching and developing people.



## Jude Gomes

CEO, Union Assurance

Mr Gomes has over 28 years of rich financial services experience working across key Asian markets. Previously, he was heading Manulife China Bank Life Assurance Philippines as CEO and president. He has been with Manulife Group since 2012, pioneering bancassurance in Vietnam as VP and head of partnership distribution.

Mr Gomes was a founding member of Canara HSBC OBC Life Insurance as senior VP and head of channel and was subsequently seconded to Hong Kong at HSBC Insurance (Asia-Pacific) Regional Business Development, working across APAC markets.

He was among the pioneers at India's first privatised Life Insurer, HDFC Standard Life and led wealth management for Centurion Bank of Punjab.

Mr Gomes is recipient of Manulife's Global Star of Excellence Award in 2013 and 2015 and Standard Chartered Bank's Regional Award in 1999. He was also awarded the CEO of the Year in 2020 by CEO monthly magazine, United Kingdom.



# The Judges



## Keith Richards

CEO, Personal Finance Society /  
Chief Membership Officer,  
Chartered Insurance Institute

A recognised leader within the insurance and financial services sectors, Mr Richards has 40 years' experience operating at the executive level across manufacturing, distribution and regulation for insurance, financial planning and professional bodies.

He established a strong media profile whilst representing Tenet Group as group distribution and development director, prior to which he was head of retail for Royal London Group. Actively engaged in the promotion of financial services within the UK and internationally, he sits on the board of the European Financial Planning Association (EFPA), chairs the Pension Advice Taskforce, is chairman of TISA Exco for Adviser Protocol and chairs the Financial Vulnerability Taskforce as well as being recognised as one of the top 100 influential figures internationally, by *International Adviser*.

Mr Richards was appointed CEO of the Personal Finance Society (PFS) in 2013 and additionally appointed as managing director for the Chartered Insurance Institute in 2016. In addition to guiding the operational and strategic evolution of the PFS, he has developed greater government and regulatory engagement for the financial services and insurance professions and brought enhancements to membership benefits and its CPD programmes, as well as launching key consumer initiatives.



## Laura Hoi

Zone Chair, South East Asia,  
2020-2021 / Million Dollar Round Table (MDRT) Membership Communications Committee, Qualifying & Life Member

Having started her career in 2002, Ms Hoi is a veteran in the financial planning industry. She is also a 17-year qualifying and life member of the prestigious Million Dollar Round Table (MDRT), with one Court of the Table and is recognised as one of a handful of private wealth consultants in her company to serve the high-net-worth segment. She values the importance of comprehensive financial planning and finds great fulfilment being able to help her clients and their families with her financial expertise. An advocate of continuous education, Ms Hoi is a chartered financial consultant as well as an affiliate member of the Society of Trusts and Estate Planners and specialises in advising professionals from the finance sector, medical professionals as well as business owners in the area of wealth management and distribution.

Ms Hoi firmly believes in and practices the 'whole person concept' – she believes that a successful life is one where a person enjoys and grows continuously in the seven different areas of their lives. Having served on various committees within the MDRT for more than 15 years, she is currently the zone chair for Southeast Asia MDRT Member Communications Committee (MCC) where she oversees the various MCCs in eight countries to raise the level of professionalism in the industry. She is also regularly invited to give speeches and workshops, to help bring up the standards of financial practitioners around the world.



## Mark O'Dell

CEO, Life Insurance Association of Malaysia

Mr O'Dell is the CEO of Life Insurance Association of Malaysia (LIAM) since 2 January 2019. A permanent resident of Malaysia, he has over 41 years of experience in the life insurance business (including 27 years in Asia) with an excellent track record in spearheading the transformation of the life insurance industry. He holds both the chartered life underwriter (CLU) and the chartered financial consultant (ChFC) designations from the American College. He is also a certified financial planner (CFP). In 2006, he was named the Personality of the Year by the Asia Insurance Review for his contribution to the industry and his leadership in corporate social responsibility.

In October 2018, Mr O'Dell was honoured with the 'Outstanding Leaders in Asia' award from ACES (Asia Corporate Excellence and Sustainability Awards). Prior to joining LIAM, he served as senior vice president, Southeast Asia of Manulife from November 2012 to January 2016, overseeing Singapore, Malaysia and Philippines during which the territories experienced strong growth. He retired from Manulife in 2018 after serving as the group CEO for Manulife Malaysia. During his 27 years in Asia, Mr O'Dell has run life operations in Malaysia, Singapore, Indonesia and Taiwan.

He was also appointed the president of the Life Insurance Association of Singapore and the Financial Planning Association of Singapore in 2007-2008 and currently sits on a number of boards and charities.

# The Judges



## Mark V T Saunders

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

Mr Saunders is a group executive committee member of AIA Group with responsibility for the group's strategy and corporate development, including M&A, corporate transactions, and strategic partnership deals underpinning ecosystem development for the group. Having joined AIA in 2014 as chief strategy and corporate development officer, he is currently a board director of various companies within the group and has been responsible for its corporate solutions, group L&H and healthcare businesses across all 18 markets. He has also served as group chief marketing officer, bringing together strategy and marketing centred around customer propositions driving evolution of customer-centricity of the business and the purpose-led strategy of helping people live healthier, longer, better lives.

Mr Saunders has been a trusted advisor of boards and board committees of leading insurers in Asia holding numerous executive and INED board positions and memberships of a multitude of insurance-related, actuarial, regulatory and professional committees. He has been a member of Hong Kong's Financial Services Development Council New Business Committee and was a member of the HKSAR Government Financial Secretary's FSTB Working Group on Long Term Fiscal Planning and the statutory body, Insurance Advisory Committee.



## Patrick Peck

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

Mr Peck is the managing director, regional agency/financial advisory and bancassurance, where he is responsible for driving the growth and governance of the agency, financial advisory and bancassurance channels across the Great Eastern Group in Singapore, Malaysia, Indonesia and Brunei.

Previously, he led various types of distribution and he has over a decade of experience in the life and general insurance sectors, where he drove the agency, financial advisory, bancassurance, partnership and HNW distribution business.

He has a Master of Business Administration from the University of Leicester, UK and a Bachelor of Science (Business Management) from the University of Northeastern, USA. Mr Peck is also an associate financial consultant.



## Paul Arrowsmith

President, International Operations, LIMRA, LOMA, and LL Global

Based in Asia since 1999, Mr Arrowsmith's former roles include head of retail bank and wealth management at HSBC Singapore, deputy regional head of insurance at HSBC Asia Pacific, HSBC head of insurance South East Asia, CEO of HSBC Insurance Singapore, country head of AXA Indonesia and deputy CEO of Allianz South Korea.



# The Judges



## Paul McNamara

Editorial Director, *Asia Insurance Review* and *Middle East Insurance Review*

Mr McNamara is a journalist, author and biographer with extensive experience in Asia, the UK, the Arabian Gulf and Australia covering the wholesale financial markets. Over the years he has worked for the Financial Times Group, Fairfax Media, Euromoney Institutional Investor, CPI Financial and Eaglemont Media. His areas of specialisation include insurance, reinsurance, Islamic finance, investment banking, project finance, trade finance, wealth management, private equity, hedge funds and alternative investments, the Middle East banking and finance industry, GCC capital markets and the world of interest rate securities. He is also the author of numerous books including *The History of Banking in the UAE*, *The History of the National Bank of Abu Dhabi*, *Dubai Islamic Bank: 35 Glorious Years* and many others.



## Rishi Srivastava

CEO, Group Agency Distribution, AIA Group

Mr Srivastava is the CEO, group agency distribution, AIA Group from October 2020, responsible for AIA Group's agency distribution function. Prior to this, he was the CEO and managing director of Tata AIA Life Insurance (Tata AIA) since August 2018. Under his leadership Tata AIA Life built sustainable business practices that served the community through protection. He is also firm believer in people being core to sustained purposeful growth.

Mr Srivastava has over 20 years of experience in agency distribution. Some of his other previous roles were chief of proprietary channels, distribution strategy, product, marketing and corporate communication, Tata AIA; marketing director (life & health), AXA Indonesia; general manager and head of non-resident Indian and global remittances, ICICI Bank; and chief agency officer, ICICI Prudential Life.

Mr Srivastava has been conferred with M.A. (Economics) and a post-graduate qualification in marketing and completed the Global Advanced Management Programme from Kellogg School of Management.



## Rotha Chan

CEO, FWD Cambodia

Mr Chan is the 2018 Asia Young Leader of the Year Award Winner and the 2017 Special Jury Award Winner by *Asia Insurance Review*. He served as a member of the judging panel of the 4th Asia Trusted Life Agents & Advisers Awards 2019.

Having been in the life insurance industry in Cambodia since the inception in 2012, he was agency officer (CAO) for Manulife Cambodia and led the largest and most professional agency force in the country measured by headcounts and the Million Dollar Round Table (MDRT) number.

Currently, he is the CEO of FWD Life Cambodia. Mr Chan has earned prestigious awards such as Manulife's Global Star of Excellence, Asia Star of Excellence and Share Your Humanity Awards.

# The Judges



## Sara Lamsam

President and CEO, Muang Thai Life Assurance Public Company Limited (MTL)

Mr Sara Lamsam is the president and CEO of Muang Thai Life Assurance (MTL). With over 28 years of experience, he has led MTL to become a leader of Thailand's life insurance industry. Mr Lamsam has taken the leading role to enhance the life insurance business with innovative ideas, holistic thinking, and change management and transformation leadership to tackle major business challenges today.

Moreover, he has been actively involved in the enhancement of rules and regulations. He has worked as the president of the Thai Life Assurance Association and worked with the Office of Insurance Commission (OIC) to set a strategic roadmap to set new standards for the sustainable life insurance industry. He has served in many business positions in the insurance industry and the financial sector such as the chairman of the Federation of Thai Insurance Organizations, the chairman of the Thai Financial Planners Association, the managing director of Life Insurance Fund, the advisor of the Society of Actuaries of Thailand, and the advisor of the Board of Trade of Thailand.

Currently, he has been studying at the National Defence College of Thailand and holds academic positions such as the advisor to the president of Association of Capital Market Academy.



## Selina Lau

Chief Executive, The Hong Kong Federation of Insurers (HKFI)

Ms Lau is the chief executive of the Hong Kong Federation of Insurers (HKFI), a trade body with 139 insurers operating in Hong Kong which represents over 90% of the market share.

Selina has accumulated extensive management and communications experience in the field of insurance since she joined the HKFI in 1997. In addition to overseeing the operations of the HKFI and its 40+ technical committees and various consumer education and communications projects, she also spearheaded a number of significant initiatives for the industry, including the Insurance Fraud Prevention Claims Database, the award-winning Motor Insurance DLT-based Authentication System (MIDAS), the virtual onboarding platform for the distribution of life insurance products, the Hong Kong Insurance Awards, etc.

Externally, she is a council member of the Institute of Big Data Governance and Road Safety Council. She also serves as member of the Insurance Training Advisory Committee of the Qualifications Framework, Road Safety Campaign Committee and Cyberport Academy Advisory Group for FinTech. She is also a member of the Education Forum of the International Union of Marine Insurance and its Asia Hub.



## Shalini Pavithran

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

Ms Pavithran is the CEO of the Malaysian Insurance Institute (MII), the leading professional body and education Institution for the Malaysian insurance industry. MII is highly respected as a regional centre offering an extensive range of professional qualifications, certification and training programmes catered for insurance professionals. MII also administers the licensing examinations for intermediaries namely insurance agents, brokers, loss adjusters and financial planners.

Ms Pavithran also serves as the CEO of the ASEAN Insurance Training & Research Institute (AITRI) in view of MII being given the mandate as the secretariat of AITRI. AITRI is a non-profit organisation established by the Insurance Regulators of the 10 ASEAN member countries and serves as a regional centre for insurance education and research focusing on capacity building of regulators and supervisors in the region.

Prior to joining MII, Ms Pavithran spent over 20 years of her career in various sectors within the financial services industry. She holds a Bachelor of Economics degree from the University of Malaya, a Bachelor of Laws degree from the University of London and has completed the Certificate of Legal Practice.

# The Judges



## Stephen Appleyard

Chief of Distribution Hub, AXA Asia

Mr Appleyard joined AXA in 2018 as head of distribution Asia having worked across Asia for the past 18 years in managing director, country management and regional management roles. He has a finance background but joined the life insurance industry 24 years ago in the UK as an insurance agent.

His extensive experience includes roles in Taiwan, Thailand, Indonesia and Hong Kong where he was CEO of partnership distribution for AIA across their 17 markets. He has also been country manager for AIA, Allianz and has run one of the leading publicly listed life insurers in Thailand, Siam Commercial Bank Life. A growth market distribution expert, he brings this wealth of experience and market knowledge to the judging panel.



## Steven Fong

General Manager, Distribution,  
Sun Life Hong Kong Limited

With over 20-year experience in the industry, Mr Fong has served in a variety of senior management positions at both local and international insurance companies across distribution channels including agency and brokerage as well as distribution training. He spearheads strategic initiatives to drive quality business growth in agency and brokerage channels that supports the company's medium-to-long term success.

Mr Fong joined Sun Life Hong Kong in January 2017 and has held various positions including head of agency business development and was promoted to the chief agency officer in 2018. He is currently general manager, distribution.

He has a master's degree in finance – wealth management from The Hong Kong Polytechnic University, and a bachelor's degree in business administration – finance from California State University, Fullerton, USA. He is also a fellow, life management institute (FLMI) and associate, customer service (ACS).



## Willison So Yu

2020 National President,  
Life Underwriters Association of the  
Philippines

Mr Yu has over 11 years' experience as a life insurance professional in the Philippines. During these years, he has qualified for the Million Dollar Round Table (MDRT) for the past eight years straight, with two Court of the Table qualifications as well.

He is a registered financial planner, a fellow chartered financial practitioner, a certified trust and estate planner, a certified wealth planner and a certified estate planner of the Philippines, having earned all these designations over the past eight years.

He served as the past president of the Life Underwriters Association of the Philippines in 2020 and currently sits as an area chair for the MDRT membership communications committee in the Philippines.

Willison is a loving father to two young boys, Warren and Liam, and a devoted husband to his wife, Jo-An.

# Rookie Insurance Agent of the Year



**Chan Fun, Nicholas**  
Manulife Hong Kong

For achieving Court of the Table (COT) status within six months as a rookie and Top of the Table (TOT) in the following successive years; for capitalising on his own experience to reach out to people in the same age group; and inspiring his fellow agents and helping to promote the culture of young Million Dollar Round Table (MDRT) achievers. .

**A**fter leaving the position of a TV host in June 2018, at the age of 23, Nicholas took a leap of faith to enter the insurance industry. Despite having no prior knowledge of finance and sales, he pushed forward with fearless determination and a desire to learn, which helped him achieve his first COT within six months as a rookie, making him the youngest COT qualifier in Manulife Hong Kong. In 2019, despite the social unrests in HK, he attained his first TOT and in 2020 achieved TOT for a second time despite the challenges of COVID-19.

Nicholas also learned to capitalise on his lack of familiarity with finance prior to becoming a financial adviser – he recognised that he could

resonate with millennials and young professionals like himself who struggled to start their journey of personal finance with the lack of relevant knowledge and a trustworthy agent. He realised that educating his clients clears up a lot of misconceptions towards the image of an agent as well as the whole industry. He also uses his Instagram account to record the bittersweet experiences of being an agent in the hopes that it will allow his clients to get to know who they are trusting their money with.

The unprecedented challenges that 2020 brought spurred him to develop new ideas as he shifted his focus to investment-linked policies, aiming to help youngsters to grow their wealth in a manageable and sustainable way, while empowering them to start investing at a young age. He also designed a curriculum for young people with the company's fund platform, providing courses from investment basics like reading fund fact sheets, to designing a portfolio that fits their risk level. This interactive way of selling that engages his clients helped him achieve his TOT by October last year.

And even with less than three years in the industry, Nicholas has been able to inspire fellow agents to go beyond their imaginations and limitations. This motivated him to take part in building the Young Round Table Committee in the company, to promote the culture of young MDRT achievers, while attending sharing sections in over 50 agencies over the last year.



# Rookie Insurance Agency Leader of the Year



**Nguyen Thi Van**  
Manulife Vietnam

For taking the initiative to improve public perception of life insurance; for building a strong team and recording outstanding performance in such a short period; and for instilling customer-centric values in her team.

**V**an has demonstrated herself to be a high achiever and an excellent leader. She joined Manulife Vietnam in February 2018. She was inspired to explore a career change after witnessing a colleague facing financial challenges with their son's hospital bills.

While Van understood the value of insurance, she wished others also could see how it could help them during difficult times. That experience cemented her mission to help lessen the financial burden and heartache brought about by a lack of insurance or awareness of its benefits.

Van's personal mission is to help change the public's perception of life insurance in Vietnam, driving an

inherent shift in attitudes that will address the protection gap and benefit the wider community. Her focus on greater societal issues such as the protection gap is also how she stands out in the Manulife community.

As a self-driven person, Van has demonstrated herself to be a high achiever and strong leader. She grew her team from 19 in 2019 to 120 advisers in 2020. She and her team contributed over VND19bn (\$828,420) in first year premiums in 2020, with a growth rate of 253% compared to 2019.

Van's team currently includes 12 agents who qualified for Million Dollar Round Table (MDRT), and 17 high performing financial consultants, representing almost a quarter of her team. Due to her outstanding performance, she has been promoted five times in just three years, from a financial adviser to unit manager (2018), to senior manager and district manager (2019) to senior district manager (2020) and now area manager.

Van is a customer-centric leader, instilling the values and benefits of service and experience. For Van, the human touch is equally important and giving customers a memorable experience is how she and the team leave a lasting impression. She also encourages the team to widen their social circles and find opportunities to protect people, improve their knowledge through continuous learning, be fast adopters of new technology and leverage social media to build their presence with younger demographics.



# Financial Adviser of the Year

## Lee Zi Yi, Michelle

Manulife Financial Advisers Singapore

For using her position and knowledge to empower women financially and strive towards greater economic and social equality; for upgrading herself with the necessary skills to enhance the quality of her service to clients during the pandemic; and for dedicating time, effort and resources to social initiatives.



Over the past year, Michelle has established a substantial following of more than 20,000 followers on her Instagram where she consistently curates educational content to educate her clients and followers on financial literacy. She also achieved Court of the Table (COT) in 2020.

As a financially literate woman with the skills and expertise to grow wealth, she utilises those assets to collaborate with women-owned businesses to provide financial literacy webinars and Instagram live series for women to have access to a robust and meaningful financial education.

She firmly believes that investing in women's financial literacy is the key to achieving economic and social

equality. With greater economic self-sufficiency and empowerment, there are no limits to what women can accomplish and she hopes to continue doing her part to empower women to achieve financial wellness.

In October 2020, she collaborated with United Women Singapore for their Empowered Women Series on Wealth Building, where she pledged her time, effort and 100% of the proceeds from her webinars on financial literacy to United Women Singapore and successfully raised S\$1,000 (\$755) to support UWS' flagship Girls2Pioneers STEM programme and their local anti-violence initiatives.

During the pandemic, Michelle sought to upgrade herself with the necessary skills to gain a competitive advantage and enhance the quality of service for her clients. She implemented a robust infrastructure that supports various swings in financial activities such as conducting online Zoom calls and hosting webinars, which proved to be beneficial for her clients.

Michelle has also been volunteering with Meals On Wheels, delivering packed lunch boxes to senior citizens living in rented or single room flats. As her following on Instagram continued to grow, she utilised her knowledge and expertise in the financial field and launched her first ever webinar on "How to Start Investing" for her followers. She managed to raise S\$1,170 from the investment webinar and 100% of the amount was donated to Singapore Children Society.

# Bank Partner of the Year

## Krungthai Bank, Thailand

For helping its partner insurer maintain its strong growth over the last few years; for transforming its salespersons into insurance and financial products specialists; and for launching initiatives that have helped its partner insurer reach untapped segments and bring more complex products to market.

**K**rungthai Bank (KTB) and Krungthai-AXA Life Insurance (KTAXA) have jointly operated over the past two decades, bringing synergy and value to Thai society by leveraging each other's expertise. KTB's commitment to customer-centricity, nationwide presence, strong sales force, and professionalism have helped the insurer become one of the top life insurers in Thailand – KTAXA's total sum assured has grown 12% annually over the past five years and the in-force sum insured accounted for 10% of the market at THB2,428bn (\$78bn).

In mid-2019, KTAXA and KTB co-ordinated a revamp of their sales staff from salespersons to financial planners (FPs) with the aim to offer better customer satisfaction by providing comprehensive financial solutions.

Since then, salespersons from more than 1,000 KTB branches have received intensive training from KTAXA to focus on providing protection advice, as well as tools to become insurance and financial products specialists. KTAXA also launched 'AXA Prime FP' brand and campaign that offers additional privileges and rewards to FPs who have performed well and passed KTB's customised health & protection products training. In 2020, AXA Prime FPs accounted for 30% of all FPs but generated 50% of the bank's fee income.

Last year also saw the launch of KTB's new customer acquisition platform on tablet, e-Solutions, that allows FPs to comprehensively explain products to customers, reducing time per acquisition and strictly follow compliance regulation. And in response to the COVID-19 pandemic, KTB began offering KTAXA products on Krungthai NEXT, its mobile banking app. It also shifted its product portfolio mix from traditional savings policies to investment-linked products and health & protection.

The FP model and new platform have helped KTB differentiate its product categories and extend health & protection products to untapped customers who are either uninsured or under-insured. Since mid-2020, the bank's customers have been able to purchase insurance through its branches using tablet or its mobile banking platform.

The initiatives have also been successful in helping KTAXA offer more complex products in the Thai insurance market, with the annualised premium equivalent contribution from investment-linked and health & protection products increasing from 21% to 51% of its portfolio total.

# Digital Agent of the Year

## Joyce Chan Ann Ni (Zeng Anni) Prudential Assurance Company Singapore

For leveraging social media and other digital tools to grow and improve her business; for taking the initiative to help her fellow financial consultants as they transitioned into the digital era; and for her efforts in sharing her experience and knowledge of human psychology.



Joyce joined the insurance profession in April 2018 and has since consecutively qualified for Million Dollar Round Table (MDRT), Court of the Table (COT) in 2021 and was awarded Rookie Insurance Agent of the Year 2020. Her business grew exponentially when she started to digitise her prospecting and client experience processes, mainly through establishing personal branding on social media and exploring digital tools.

As a strong advocate of digitalisation and social media, Joyce has implemented digitalisation in every aspect of her business. She has also given training to thousands of financial consultants (FCs) across Asia to help them adapt to digitalisation in the new business landscape.

On the client end, her business is 100% powered by passive referrals that mostly come through social

media. The client's experience with Joyce is also mostly digitised from end-to-end.

She utilises GoalsMapper Fact Find form prior to meeting the clients and obtains close to 100% information for most of her clients before the appointment. During the appointment, Joyce uses GoalsMapper, Canva and various software and data presentation tools to go through the analysis with her clients.

On social media, her #DabaoLife video series pushes out key messages that Joyce finds inspiring to her clients. This also allows potential prospects to get to know Joyce prior to even meeting her and can already assess her values and who she is as a person. As such, most of her passive business from social media has come from quality prospects who have made the decision to work with her through her social media content.

On the financial consultant's end, Joyce initiated and held training sessions for her company when she realised that FCs were struggling to adapt to the video conference environment during the Circuit Breaker period and since then has trained hundreds of FCs to adapt to the new way of doing business.

In 2020, she took up over 30 speaking and sharing engagements to share her experiences with and train fellow FCs how to conduct business digitally. As a trained Human-Centred Design and User Experience practitioner, Joyce also injects an understanding of human psychology when training FCs on how to adapt to the digital era. As an MDRT Mentor in Prudential Singapore, she mentored three fellow FCs to utilise digital tools in their business. These three FCs are now all first-time qualifiers for MDRT 2021.

# Employee Benefits Consultant of the Year



**Anthony Wong**  
AIA International, Hong Kong

For always going beyond contractual obligations to build strong relationships with his clients; for finding ways to innovate and address shortcomings in the business; and for leading by example and mentoring new people and encouraging them to pursue the employee benefits business.

**A**nthony joined AIA in 1982 for his first job in Hong Kong after graduating in the UK and in 1984, he signed his first group insurance case. Today, as district director at AIA International, he serves clients of every size, from small and medium-sized enterprises (SME) to multinationals.

Driven by integrity, sincerity, and mutual respect, he has achieved Million Dollar Round Table (MDRT) status annually since 1997, Top of the Table (TOT) annually since 2010, and holds numerous employee benefits records in AIA Group's history including highest in-force portfolio and highest premium from one case. His team currently serves over 44,000 members from 100 corporations, with over \$65m in annualised premiums, of which \$52m comes from his personal portfolio.

Anthony sees himself as a partner to his clients and feels good about the work he does for them. He believes that connection with them is key, and that building a strong relationship means delivering beyond contractual requirements and exceeding expectations in communication, energy, and results. He makes absolutely sure to keep pace with developments in the HR community to anticipate his clients' needs and, create an open and transparent relationship where feedback is shared, respected and responded to.

He also constantly looks for ways to innovate and stay ahead of the competition. Recognising the protection needs of many employees as well as the financial and social needs of employers, he worked with AIA to develop the StepUp medical product, which has enjoyed an overwhelmingly positive response, and become part of the company's core strategy to explore employee voluntary solutions. More than 10,000 of those policies have been sold since, and over 12% of these StepUp policyholders have purchased other life products.

With a burning passion for employee benefits, Anthony always wants more people to join him in the business and he is more than happy to help them along the way. With the rapid growth of the China market, the AIA China Corporate Solutions team has invited him every year to speak at their annual Employee Benefits Summit and he has also shared his stories and lessons he has learned with colleagues in Singapore, Malaysia, Thailand, Philippines, and Indonesia. He enjoys meeting young and hungry professionals, listening to their perspectives and sharing his experiences with them.

# InsurTech of the Year

## HeartzMail

For creating tools that enhance the quality of relationships between agents and their clients; for simplifying technical terms to make it easier for clients to understand their insurance coverage; and for developing personal branding tools that help advisers enhance their position and referrals.

When financial technology comes to mind, there are two main types of technologies — technologies designed to replace financial agents, and technologies designed to support financial agents. Headquarter (HQ), an innovation by HeartzMail, belongs to the latter. In facing increasing competition in the financial industry, the HQ platform that was designed with the needs of financial advisers and experience of their clients in mind.

The success of HQ is evidenced by the numerous testimonials that showcased the benefits and return on investment that users and agents have reaped from using the various technologies powered by HQ. Users have found HQ to be user-friendly, human-centric and valuable in solving real pain points as the system helps to streamline day-to-day business and sales processes.

Unlike many other CRM companies that focus on purely keeping

data, HQ places strong emphasis on delivering touchpoints and enhancing the quality of relationships between clients and agents. HQ's proprietary innovation, FirstPage, has helped agents consolidate a daily focused to-do list that cultivates a habit of calling on their clients regularly on their birthdays and for reviews. This not only increases agents' engagement with clients and odds of conversion, but more importantly, this closes the servicing gaps and increases repurchase rates in the marketplace.

While InsurTech companies tend to focus on sophisticated summaries that contain jargon that mostly only agents can understand, HQ stays invested in helping the layperson understand the key figures that matter in their financial portfolios. The layperson who receives summaries via WhatsApp or Telegram from their agents tend to help them remember their coverage, plans and shortfalls better.

The personal branding tools provided by the Headquarter platform have also helped many advisers enhance their positioning and referrals, and currently powers some of the highest numbers of personal web profiles in the InsurTech industry.

In addition, the capability to automate the sending of physical cards and allow agents and users to upload their own images through the digital HQ platform has enabled users to display their creativity and individuality through customisation, bringing about higher satisfaction among agents' clients and their families.

The unique and innovative solutions by Headquarter are in tune with the needs of the financial services market, and the out-of-the-box and fresh solutions that HQ came up with has brought about positive changes and impacted the way advisers think about and carry out their business and handle relationships.



# Digital Transformation of the Year

## AIA Singapore

For creating an app that allows agents to serve their customers better; for developing a claims portal that drastically speeds up claims turnaround time; and for launching a platform that lets customers better engage with their insurance portfolios.

**A**IA Singapore has gone to great lengths to make sure its agency force is well-equipped to serve its customers in the digital age. To free up its agents' time and allow them to focus more on deepening customer relationships, it has focused on strengthening the digital ecosystem that makes its entire organisation simpler, faster and more connected.

In January 2020, AIA Singapore launched iSMART, a super-app that supports its agency force with features that have been purposefully engineered around customers, going beyond statistics to paint a holistic story.

iSMART helps agents take the guesswork out of customer engagement – analytics-backed propensity models help agents to be more targeted at engaging customers for cross-/up-selling by addressing their specific needs through personalisation.

Last year, over 225,000 leads and S\$45m (\$33.9m) in annualised new premiums were generated via agents leveraging iSMART to share relevant campaigns with prospects and customers, and almost 70% of total sales of AIA's MultiStage CancerCover product were purchased on AIA NOW, a self-fulfilment platform integrated with iSMART that allows customers to purchase products instantly.

To create a simple and speedy claims experience for its customers, the insurer launched its Claims EZ portal that was developed in partnership with AiDA Technologies. The portal allows Singaporeans to submit claims digitally via SingPass Mobile and AIA 2FA remote authentication, provides immediate claims decisions through auto-adjudication using AI and supervised machine learning and offers customers almost real-time cashless payouts through PayNow.

With Claims EZ, the company's end-to-end turnaround time for claims processing, from the point of submission to final disbursement of claims payout, has been reduced to one to four working days, compared to the industry average of two weeks minimum.

And to give customers more visibility and control over their insurance portfolios, AIA Singapore rounded off its digital ecosystem with My AIA SG – a 24/7 secure digital platform developed specially for its customers to inform, enrich and empower them with 'self-service' technology, allowing them to make up to 28 different types of day-to-day service requests.

As of December 2020, more than 560,000 AIA policyholders were on My AIA SG, an average monthly increase of 15,000.

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# Employee Benefits Provider of the Year

## AIA China

For creating an online platform that facilitated the work and training of its agents; for upgrading its HR infrastructure to cope better with the challenges presented by the pandemic; and for upgrading its employee benefits services to make sure employees were well taken care of during the pandemic.

**A**IA Corporate Solutions (AIA CS) has been active in the employee benefits market in the region for over six decades with an extensive operational footprint across Asia Pacific. AIA China CS was established in 2006 and started with a focus on the small and medium enterprise (SME) segment. Today, it serves over 40,000 corporate clients with 1.3m members from local SMEs to multinational corporations.

Committed to transforming from a group insurance provider to trustworthy wellness partner, the company relentlessly designs and develops better sales tools, equipping its sales force to provide ease and timely sales assistance and service. It has also invested in developing unique value-added services for clients to meet their needs in employee benefits and workforce wellbeing.

AIA China CS always puts the customer first and during the COVID-19 pandemic, it acted immediately and accelerated digitalisation to address challenges faced by agents, HR and employees.

For the agents, the company created an integrated end-to-end digital platform and moved all its training sessions online. It also worked with a model that encourages more members to get online, create engagements and identify their potential needs, and link them up with corresponding agents. Eleven online activities were launched on the AIA CS WeChat platform involving 10,117 members and insurance take-up ratio from those engaged members are three times higher than non-engaged members.

AIA China CS also launched a series of online HR seminars to timely and accurately respond to HR questions about COVID-19, as well as promoting a healthy workplace. Five well-known industry experts shared 11 online courses with over 1m views. It upgraded its online E-service HR platform that allowed HR to cope with routine work more easily and provide better employee experience.

For its employees, the company launched and promoted multiple online healthcare services to help employees conveniently get online medical consultation as well as drug dispensing and delivery services for insureds with hypertension and diabetes. And with the pandemic severely hindering employees from obtaining offline employee benefits services, it upgraded its WeChat platform to allow them to make queries, submit claims applications and purchase group voluntary solutions.

# Inspirational Leader of the Year

## Karine Lam

AIA International, Hong Kong



For maintaining consistently high standards while being an inspiration to those around her; for leading her team in efforts to help vulnerable segments of the community during the pandemic; and for being a positive influence while giving back to the industry and the community.

When Karine joined AIA in 2006, she did so with no prior related experience and with her family in debt. Despite that, she managed to do well and over the last 14 years, she has maintained a high level of performance in terms of team development, as well as personal production – She has qualified for Million Dollar Round Table (MDRT) six times, Court of the Table (COT) four times and Top of the Table (TOT) four times in her 14 years as an MDRT life member. In 2012, she was also awarded the Hong Kong Professional Elite Ladies Awards.

She was appointed district director in December 2013, in what was considered one of the fastest promotion records in both the AIA group and the industry. Since then, she has been awarded Insurance Agency Leader of the Year 2017 and has been listed among the

Most Outstanding Female Leaders in Asia 2018 and Jessica's Women of Excellence 2019.

As a female leader in the insurance industry Karine is driven to help others reach their dreams, believing that nurturing talents to become professional advisers will multiply the power of giving and serving, and ultimately have a positive impact on society.

Throughout the challenges of 2020, her group never stopped serving those in need, particularly the elderly, underprivileged and street cleaners. When COVID-19 sparked panic buying and prices of pandemic protection items soared and became unaffordable to the underprivileged, her group bought and donated 41,700 masks and 382 hand sanitisers to the elderly living alone via Bliss District Elderly Community Centre (BDECC), and to street cleaners by hand.

When social distancing regulations disrupted agency operations, she stepped up to lead by example, leveraging digital initiatives to move business activities online. Her efforts paid off and not only did she manage to maintain her high standards of performance, she also inspired several of her teammates to make personal breakthroughs as first-time TOT qualifiers.

And with so much negativity surrounding COVID-19, Karine made sure to be a source of love and energy. She organised various workshops, seminars, internship and mentorship programmes during the pandemic and in addition to participating in the company's community initiatives, she also worked with organisations like The Plan International, BDECC, Hong Kong Road Safety Patrol and HKU Space.



# Insurance Agency Leader of the Year



## Shih Fang Huang

Cathay Life Insurance, Taiwan

For helping his unit achieve excellent long-term performance via recruiting and giving lectures on business topics; for sharing his experience managing agencies and sales teams with less experienced sales managers; and for outstanding leadership which has seen many of his subordinates qualify for Million Dollar Round Table (MDRT).

**M**anager Shih-Fang Huang from the Cathay Life Insurance's Zhangtai branch has been in the industry for 25 years since he began working at Cathay Life in 1995. He has served as the branch manager of four branches, and senior researcher in South District Operation Management Department since 2002. He became the president of the Zhejiang Province branch company in China in 2010 and assembled a strong team of agents for expanding business overseas.

Being an insurance agent is his calling. He excels at combining modern economic issues with his insurance expertise and using the insurance industry as a platform for resolving people's financial issues. He is also a writer on economics and management, and published

the book *Capitalist Evils Café*, which discusses the wealth gap and business management issues. The book is collected in the National Central Library (Taiwan) and National Library of China (China).

Huang excels at combining modern economic concepts and social issues with insurance practices and has helped the unit achieve excellent long-term performance via recruiting and giving lectures on business topics.

Huang's book, *Capitalist Evils Café*, not only discusses the current wealth gap and social and economic issues, but also shares his 19 years of experience managing agencies and sales teams with less experienced sales managers. His willingness to share was not affected by the pandemic, and he was invited to serve as a lecturer in a training course for companies in China in 2020.

Sales at the Zhangtai branch grew 91% and the organisation grew 37% after he took over in 2012. He drove team growth by encouraging colleagues to realise their goals. In 2020, six subordinate agents were promoted to unit supervisor trainees, and one to branch development and training specialist. The unit cultivated two district specialists who were promoted to managers in the past four years.

Under his leadership, his subordinates qualified for the Million Dollar Round Table (MDRT). In 2020, the unit had 33 people who qualified for the MDRT (accounting for 33% of the unit's personnel), and the branch led by Huang had the highest number of MDRT members in the company for three consecutive years (2017-2019).



# Lifetime Achievement Award



## Wong King Kwok Raymond

AIA International, Hong Kong

For his continued efforts over many years to improving the image of the industry and its agents; for sharing his knowledge and experience through books and workshops which benefitted agents and other professionals; and for working to address industry issues while maintaining the highest levels of performance.

**A**n executive district director at AIA International, Raymond leads the largest group comprising 25 senior and district directors with 3,500 financial planners. He is a trustee of the New Asia College of The Chinese University of Hong Kong, honorary life vice president of The Hong Kong Polytechnic University Foundation and founder chairman of the World Outstanding Chinese Association. For more than 35 years, he has made significant contributions to human capital development and youth employment.

Having worked with AIA for 43 years, Raymond is familiar with how the industry and its sales agents are sometimes viewed in a negative light. To correct the misconceptions, he wrote a best-selling book '敢作敢为 – Dare to Achieve' with the aim of

sharing his experiences and motivating downline agents as well as to foster society's respect for the profession.

To develop a highly qualified team and increase the industry's market recognition, he kept learning and participating in many advanced areas of study, such as psychology, philosophy and human capital management.

After completing a course to improve his writing skills, he proceeded to write '价值转乾坤 – The Value Changed' which became a best-selling book in Hong Kong and China, having sold over 200,000 copies. The book offered real-life references for agents and inspired him to start a human capital development training programme for the industry, where he managed lectures and workshops which have been attended by more than 20,000 people in Hong Kong, Mainland China and Southeast Asia.

In 1997, he wrote another book called '368° 赢尽生命 – 368° Win the completed life' and organised a training programme for the Continuing Education Fund (CEF). This personal talent workshop supported by the Hong Kong Government provided leadership training for civil servants, businessmen and entrepreneurs. The book contributed to building social recognition and respect for insurance practitioners and built a positive image for the industry.

Over the decades, Raymond has also played an integral role in managing the abuse of compensation claims and controlling the rapid increase in the cost of medical premiums, while maintaining the highest levels of performance in the group insurance sector.

# Insurance Agent of the Year

## Wee Keng Kin Jacqueline AIA Singapore

For going the extra mile to take care of her clients and raise support for those in need during a pandemic; for giving back to the industry by providing guidance for new agents; and for building strong relationships that have seen her stand by her clients across multiple generations.



When she was 17 years old, Jacqueline's father suffered a stroke and with no insurance, she had to take a tuition fee loan and give part-time tuition to fund her studies. This fuelled her belief in the importance of insurance and in 1996, while still an undergraduate, she started her career with AIA at the tender age of 21.

Consistent and hardworking, she has since qualified for the Million Dollar Round Table (MDRT) for 20 years, Court of the Table (COT) nine times, and reached Top of the Table in 2021. She has attained the highest accolade, the Centurion Club, in AIA Singapore for 21 consecutive years since 2001 and has also qualified for the President Club, which recognises the crème de la crème from each country within the AIA Group, for five terms.

During the COVID-19 pandemic, Jacqueline went the extra mile to make sure her clients were well taken care of. She spared no effort in sourcing for hand sanitisers and masks for her clients, at a time when there were almost no supplies in Singapore, and sent out numerous care-packages of masks, hand sanitisers and Vitamin C, to her clients, giving priority to families with senior citizens or children.

Throughout this period, she continued to reach out to more charities on top of her regular contributions, while encouraging her peers to do the same. She also shared various links to encourage her clients who were not affected financially to reach out to those in need.

Harbouring a passion for teaching, Jacqueline has mentored countless people over the years, many of whom managed to grow their business and qualify for the MDRT and COT with her guidance. She shares her secrets of success with new agents and often encourages them to offer service with a genuine heart.

Jacqueline has also demonstrated a tremendous ability to build long-term relationships by making sure to be there for them through good and bad times while ensuring their health and financial needs are taken care of. After 25 years in AIA, she is currently serving the 3rd generation of her clients.

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# Young Executive of the Year



**Yun Ching Shih, Batsy**  
Cathay Life Insurance, Taiwan

For creating systems that educate the company's agents and spreads the experience of standout agents; for coming up with marketing tools that help agents raise customer awareness of insurance, and for coming up with a methodology that allows agents to communicate insurance concepts more completely.

**B**atsy is the manager of Cathay Life Insurance's (Cathay) Marketing Planning section, leading a team of 21 members. She also plays a linking role in the company's mid-term strategic development leading a team across four departments.

She has been described as an innovator dedicated to creating new business models and is constantly resolving difficulties encountered by agents. To solve agents' difficulties in expanding their customer base, she established a systematic worksite model that successfully attracted 24,000 customers from different industries.

Batsy is dedicated to improving four key competencies of Cathay's 27,000 agents: Cultivation competency, professionalism, marketing competency and agility. Based on her team members' specialties, she built a systematic '4E' model which comprises lecturer cultivation (education), experience

duplication (experience), participation and exchange (engagement) and efficient tool application (efficiency).

For education, a product consultant selection and evaluation system was established, where outstanding agents with marketing experience are selected to be trained as lecturers, and will eventually have the responsibility of teaching local agents.

To spread experience, Batsy and her team conduct seminars where external experts are invited to improve product knowledge, and internal experts share their marketing practices. To increase agility, she engaged outstanding agents as product consultants to conduct in-depth discussions on product design and set up a communication group to share product information and gather feedback on a regular basis.

She also realised that agents need to be able to share case examples when they communicate insurance concepts to customers. In light of that, she led her team to select common claims settlement cases, together with interactive questions and diagram analysis, and generated 30 online marketing books targeting different types of insurances and customer groups, which quickly raised customers' insurance awareness.

To allow agents to communicate insurance concepts more completely, Batsy worked with agents to develop the 321+1 protection requirements methodology. She implemented it in Cathay's exclusive scientific management tool, the Cathay Box app, which allows agents to systematically establish the concept of overall protection breadth and depth for customers. Results have shown that the follow-up closing rate with customers contacted using this strategy is 1.7 times higher than using the normal marketing model.



# Insurance Company of the Year

## AIA Singapore

For empowering its agents with digital tools during the pandemic; for helping its customers and the community manage and overcome the challenges of the pandemic; and for supporting Singapore's efforts to upskill the financial sector workforce.

Having already been on a three-year digital transformation roadmap since 2018, AIA Singapore was well-positioned to equip its agents with the digital tools and abilities they required to continue serving its customers through the disruption caused by COVID-19.

Despite this head-start, the insurer was not content to rest on its laurels and sought to not only help its customers cope with the challenges of the pandemic but overcome them. Taking a holistic approach, AIA Singapore focused on elevating its 'Premier Agency' vision in a few key areas.

Doubling down on customer-centricity, the company launched iSMART, an all-in-one agency mobile app, as part of its efforts to strengthen its digital ecosystem and provide a seamless end-to-end digital experience for its customers. With added financial

anxiety stemming from the pandemic and greater expectation for agents to deliver on their promise, AIA Singapore also introduced a claims portal, Claims EZ to reassure its agents of their ability to pay out claims quickly for customers.

With COVID-19 continuing to cause significant anxiety about financial futures and job security, the insurer launched its #EmbracingNewNorms campaign that featured value-added services, complimentary benefits, promotions and consumer education throughout 2020 that stayed sensitive to consumer needs at different stages of the evolving COVID-19 situation.

As part of the campaign, AIA Singapore granted free COVID-19 coverage for 2.6m of its customers, employees and tied representatives; paid for 50,000 telehealth consultations, allowing customers to seek medical help from the comfort of their own home; and offered the AIA COVID-19 Support Programme that allows financially affected corporate customers and individuals to extend the grace period of premium payments.

The insurer has continued to support Singapore's national agenda of upskilling for a more competitive financial sector workforce. It introduced AIA Financial Career Scheme 2020 – a strategic collaboration between AIA Singapore and AIA Investment management. The programme created 500 new job opportunities with its agency force and provided in-depth training and financial support aimed at fresh graduates and mid-career switchers.

To give back to the community the insurer launched the AIA #ShareTheLove movement to protect essential workers and underprivileged families. AIA agents pledged their support by donating a portion of their policy sales during this period, with all donations matched by AIA Singapore.

# Executive Champion of the Year



## Wen Wei Fan

Nan Shan Life Insurance, Taiwan

For conceptualising and implementing strategies including establishing a systematic agent training platform to transform the company's sales force; for helping the company innovate through introduction of new policies and cooperation with a local university; and for spearheading sustainable philanthropy and public services.

**W**en Wei Fan joined Nan Shan Life Insurance (Nan Shan) in 1994 as an entry-level employee and over the years has advanced and progressed through the ranks. In 2017, he was promoted to head of agency channel and is currently one of Nan Shan's senior vice presidents.

Under Wei Fan's leadership, Nan Shan's total asset surged 28% from \$134bn in 2017 to \$172bn in 2020. The company is currently one of the largest insurance companies in Taiwan with 11m active policies, 6.29m active insurance holders with quality protection, 25 branch offices and 317 agency offices throughout the country.

In 2020, despite the challenging year, he managed to conceptualise a number of strategies – for implementing sales transformation,

insurance innovation, and practicing sustainable philanthropy and public services – and led the company's business teams to achieving those goals.

Firstly, Wei Fan established a systematic agent training platform to promote the Million Dollar Round Table (MDRT) and co-develop an eMBA program with National Taiwan University for Nan Shan's senior management. The platform has trained 1,423 people to serve as supervisors and increased the company's sales force by nearly 6,000 – a 19.6% increase.

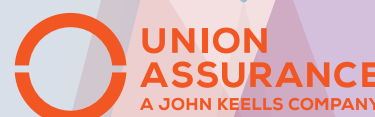
He also helped the company continue to innovate in its transition from simply paying claims to prevention. This was achieved via the introduction of a series of 'spillover' policies, as well as health management services which involved cooperation with Taipei Medical University.

And to achieve the targets of practicing sustainable philanthropy and public services, he worked with 204 hospitals in Taiwan to promote the Nan Shan Charity Fund—Medical Care Plan, which has since donated over \$14m and benefitted 37,000 people.

During the year, he also helped the company implement inclusive financial services, working with local cities and counties to promote and provide micro-life insurance to low income Taiwanese.

On top of all that, he actively led agents to form the Nan Shan National Relief Volunteer Team to assist the government to explain the relief plan during the pandemic. More than 16,000 Nan Shan agents have participated in the volunteer team training, while 7,512 have completed it.

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ASSURANCE**  
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## ORGANISERS



### 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.

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## ASIA INSURANCE REVIEW

Member: Beacon International Group, Ltd.



As we celebrate 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](http://www.asiainsurancereview.com)



# PARTNERS

## Asia Advisers Network

Member: Beacon International Group, Ltd. 

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](http://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

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# PARTNERS

## 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 – wholly-owned branches and subsidiaries in Mainland China, Hong Kong SAR(1), Thailand, Singapore, Malaysia, Australia, Cambodia, Indonesia, Myanmar, the Philippines, South Korea, Sri Lanka, Taiwan (China), Vietnam, Brunei, Macau SAR(2) and 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 Asia (ex-Japan) based on life insurance premiums and holds leading positions across the majority of its markets. It had total assets of US\$326 billion as of 31 December 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, AIA serves the holders of more than 38 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](http://www.aia.com)

### Notes:

1. Hong Kong SAR refers to Hong Kong Special Administrative Region.
2. Macau SAR refers to Macau Special Administrative Region.

## SPONSORS



The Allianz Group is a global financial services provider with services predominantly in the insurance and asset management business. Over 100 million retail and corporate clients in more than 70 countries rely on our knowledge, global presence, financial strength and solidity. In fiscal year 2020 over 150,000 employees worldwide achieved total revenues of 140.5 billion euros and an operating profit of 10.8 billion euros. Allianz SE, the parent company, is headquartered in Munich, Germany.

Our strengths as a global business:

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- Among the top 5 Life/Health business globally
- Among the top 5 asset managers globally
- Global leader in credit insurance
- Worldwide leader in travel insurance and assistance services
- One of the leading corporate insurers globally

Allianz has been present in Asia since 1910, when we first provided fire and marine insurance in the coastal cities of China. Asia is the growth engine for the Allianz Group, characterized by a rich diversity of cultures, languages and customs. Today, Allianz is active in 16 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 22 million customers in the region across multiple distribution channels and digital platforms.

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Union Assurance, one of the oldest, private Life Insurance solutions providers in the country has been in the business of protecting lives, empowering people to achieve their dreams, and providing peace of mind to thousands of Sri Lankans since 1987.

Under the banner 'Your life, Our strength,' the company has

nurtured the Sri Lankan dream in unique and personal ways to support our policyholders and the people they love. Union Assurance offers a range of Life Insurance solutions covering areas such as investment, protection, retirement, education, health, and employment designed to meet the needs of a wholesome life.

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[www.unionassurance.com](http://www.unionassurance.com)

# The Finalists

## Rookie Insurance Agent of the Year



**Chan Fun, Nicholas**  
Manulife Hong Kong



**Dr Cheung Kin Keung, Dennis**  
AIA International Limited, Hong Kong



**Keo Sochenda**  
AIA Cambodia



**Rex Wong**  
AIA International Limited, Hong Kong



**Zar Ni Win**  
AIA Myanmar

## Rookie Insurance Agency Leader of the Year



**Hsiu Mei Lin**  
Cathay Life Insurance, Taiwan



**Li Kin Ming, Nic**  
Sun Life Hong Kong Limited



**Nguyen Thi Van**  
Manulife Vietnam



**Suranga Samarakoon**  
Union Assurance PLC, Sri Lanka



**Yung Lai Hei Terence**  
AIA International Limited, Hong Kong

## Financial Adviser of the Year



**Lee Zi Yi, Michelle**  
Manulife Financial Advisers, Singapore



**Loy Hsieh-Yih**  
AIA Financial Advisers, Singapore



**R.D.N.Prabath Manupriya**  
Union Assurance PLC, Sri Lanka

## Bank Partner of the Year

**Bank of China (Hong Kong)**

**Krungthai Bank PLC, Thailand**

**Nations Trust Bank, Sri Lanka**

**Philippine National Bank**

**PT Bank Central Asia Tbk (BCA), Indonesia**



# The Finalists

## Digital Agent/ Agency Leader of the Year



**Andy Peh**  
Professional  
Investment Advisory  
Services Pte Ltd



**Joyce Chan Ann  
Ni (Zeng Anni)**  
Prudential Assurance  
Company Singapore



**Karine Lam**  
AIA International  
Limited, Hong Kong



**Matthew Chew**  
AIA Financial  
Advisers, Singapore



**Wei Yiyang**  
AIA Financial  
Advisers, Singapore

## Employee Benefits Consultant of the Year



**Anthony Wong**  
AIA International,  
Hong Kong



**Divya Tusnial**  
TATA AIA Life, India



**Geraldine Tan Wei  
Fang**  
AIA Singapore



**Huei-Lin Huang**  
Nan Shan Life  
Insurance Co Ltd,  
Taiwan



**Panupan  
Ekchukiat**  
AIA Company  
Limited, Thailand

## Inspirational Agent/ Leader of the Year



**Divya Tusnial**  
TATA AIA Life, India



**Karine Lam**  
AIA International  
Limited, Hong Kong



**Linda Herawati**  
Allianz Life Indonesia



**Matthew Chew**  
AIA Financial  
Advisers, Singapore



**Sunny Yap**  
AIA Financial  
Advisers, Singapore

## InsurTech of the Year

Heartzmail Pte Ltd

IFAAcademy – International  
Financial Architects

Surer

# The Finalists

## Lifetime Achievement Award



**Lourdes Del Mundo**  
AIA Philam Life,  
Philippines



**Wong King Kwok Raymond**  
AIA International  
Limited, Hong Kong



**Yap Boon Lee**  
AIA Berhad,  
Malaysia

## Insurance Agency Leader of the Year



**Dato Eric Toh Chun Shiong**  
Great Eastern Life  
Assurance Malaysia



**Dato Sri Norman Pang**  
Allianz Life Insurance  
Malaysia Berhad



**Matthew Chew**  
AIA Financial  
Advisers, Singapore



**Shih Fang Huang**  
Cathay Life  
Insurance, Taiwan



**Wong Ngao San Marcus**  
AIA International  
Limited, Hong Kong

## Insurance Agent of the Year



**A. H Sajeewa Pushpitha**  
Softlogiclife  
Insurance PLC,  
Sri Lanka



**Cheung King Fung Kenneth**  
AIA International  
Limited, Hong Kong



**Ming Fong Huang**  
Nan Shan Life  
Insurance Co Ltd,  
Taiwan



**Shalini Kohli**  
Max Life Insurance,  
India



**Wee Keng Kin Jacqueline**  
AIA Singapore

## Digital Transformation of the Year

AIA Bhd, Malaysia

AIA Singapore

Allianz Life  
Insurance  
Malaysia Berhad

FWD Singapore  
Pte Ltd

Taiwan Life  
Insurance Co Ltd

# The Finalists

## Young Executive of the Year



**Senath  
Jayathilake**  
Union Assurance  
PLC, Sri Lanka



**Yun Ching Shih,  
Batsy**  
Cathay Life  
Insurance, Taiwan

## Employee Benefits Provider of the Year

AIA China

AIA International Limited,  
Hong Kong

AIA Singapore

## Insurance Company of the Year

AIA Singapore

AIA Company Limited, Thailand

TATA AIA Life Insurance  
Company Limited, India

# Roll of Honour

## **Rookie Insurance Agent of the Year**

**Chan Fun, Nicholas**  
Manulife Hong Kong

## **Rookie Insurance Agency Leader of the Year**

**Nguyen Thi Van**  
Manulife Vietnam

## **Financial Adviser of the Year**

**Lee Zi Yi, Michelle**  
Manulife Financial Advisers Singapore

## **Bank Partner of the Year**

**Krungthai Bank, Thailand**

## **Digital Agent of the Year**

**Joyce Chan Ann Ni (Zeng Anni)**  
Prudential Assurance Company Singapore

## **Employee Benefits Consultant of the Year**

**Anthony Wong**  
AIA International, Hong Kong

## **InsurTech of the Year**

**Heartzmail**

## **Digital Transformation of the Year**

**AIA Singapore**

## **Employee Benefits Provider of the Year**

**AIA China**

## **Inspirational Leader of the Year**

**Karine Lam**  
AIA International, Hong Kong

## **Insurance Agency Leader of the Year**

**Shih Fang Huang**  
Cathay Life Insurance, Taiwan

## **Lifetime Achievement Award**

**Wong King Kwok Raymond**  
AIA International, Hong Kong

## **Insurance Agent of the Year**

**Wee Keng Kin Jacqueline**  
AIA Singapore

## **Young Executive of the Year**

**Yun Ching Shih, Batsy**  
Cathay Life Insurance, Taiwan

## **Insurance Company of the Year**

**AIA Singapore**

## **Executive Champion of the Year**

**Wen Wei Fan**  
Nan Shan Life Insurance, Taiwan