

NOMINATION

7TH ASIA TRUSTED LIFE AGENTS & ADVISERS AWARDS

2022



HOW TO ENTER

SUBMISSION DEADLINE:

31 MARCH 2022 (THIRD-PARTY NOMINATIONS)

14 APRIL 2022 (SELF-NOMINATION)

JUDGING DAY: 9 JUNE 2022

AWARDS CEREMONY: 26 JULY 2022

Organisers

 **Asia Advisers Network**

Member: Beacon International Group, Ltd. 

**ASIA
INSURANCE REVIEW**

Member: Beacon International Group, Ltd. 

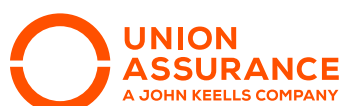
Co-Organiser

LIMRA

Strategic Partner



Sponsor





SUPPORTING ORGANISATIONS



Asia Pacific
Financial Services
Association



Persatuan Insurans Hayat Malaysia
Life Insurance Association of Malaysia



THE MALAYSIAN
INSURANCE INSTITUTE



PHILIPPINE
LIFE INSURANCE
ASSOCIATION, INC.

PIFAAP



PROFESSIONAL INSURANCE AND
FINANCIAL ADVISORS ASSOCIATION
OF THE PHILIPPINES



SINGAPORE
INSURANCE
INSTITUTE

www.AsiaAdvisersNetwork.com/awards





Rewarding excellence in an everchanging world

We have completed two years of an ongoing pandemic and by the looks of it, COVID is here to stay. That seems to be the lesson of 2022. Despite the challenges of the last couple of years, we have not seen any reduction in the passion, endurance and downright grit of the insurance industry. More so when it comes to agents and advisers. In fact, they continue to amaze us. Looking at the level of excellence, perseverance, empowerment and innovative ways in which agents continue to serve their clients, we should take our hats off to them for keeping the bar so high.

Asia Advisers Network (AAN) and Asia Insurance Review, together with co-organiser LIMRA and strategic partner AIA, are indeed proud and humbled to be able to continue the journey of rewarding the excellence of these soldiers of the industry. This is our 7th year of hosting the Asia Trusted Life Agents and Advisers Awards.

We are truly honoured to be a part of this journey. Agents and advisers remain an integral and indispensable part of the value chain.

These awards are an opportunity not only to endorse and reward excellence for deserving candidates, but also to raise standards and education for the industry as a whole. Aside from the agents, companies who work behind the scenes to enable agents to push beyond the limits are also recognised.

We would like to thank our esteemed panel of 26 judges, as well as independent auditor EY for their commitment to this cause, not to mention the supporting associations as well. I am most grateful to Mark Tucker, our patron for his foresight and support over the years.

We look forward to welcoming the entries this year. Stand tall, be counted and continue to live with passion!



Sheela Suppiah

CEO,
Asia Insurance Review and
Middle East Insurance Review

Recognising the immense contribution of agents and advisers

The past year has seen a continuation of many of the pandemic-related challenges faced across the world. Against this backdrop and a continued focus on both wellbeing and digitalisation, the vital role played by agents and advisers has once again been clearly demonstrated.

When we launched the 2020 edition of these prestigious awards, it was impossible to foresee how the next two years would play out. The pandemic is clearly not yet over; new variants have brought renewed health risks and led to tightened restrictions in many parts of the world. At the same time, we have made progress since we launched the 2021 edition of these awards. The successful rollout of vaccines has allowed economies to reopen and the economic recovery is well underway.

As a powerful source of long-term investment capital, trusted risk managers and pioneers in new products and technology, participants in our industry have played a critical role in supporting the global economic recovery.

As always, we are only as good as our people. To this end, I am delighted to say that agents and advisers have again raised the bar to new levels – helping our customers to navigate unfamiliar terrain and providing peace of mind in difficult times. Furthermore, they have continued to harness new digital products and services to provide the right coverage to meet our customers' needs. In so doing, they have once again helped our communities to become stronger and our industry to grow.

My sincere thanks go to *Asia Insurance Review* and *Asia Advisers Network* for helping us celebrate the many achievements and contributions of all agents and advisers.



Mark Tucker

Group Chairman,
HSBC Holdings plc

THE JUDGES



Andy Law Min

President,
Financial Services Managers Association (FSMA)
2020/2022



Anurag Gupta

National Head, Agency Sales,
Max Life Insurance Company Limited



Benedicto Sison

CEO and Country Head,
Sun Life Philippines



Calvin Lee

Financial Services Director,
AXA Insurance Pte Ltd
Board Of Governors (2021/22),
Financial Services Managers Association
Winner of Digital Agency Leader of the Year
(4th Asia Trusted Life Agents & Advisers Awards)



Davey Lee

President,
The Life Underwriters Association of Hong Kong
Senior Regional Director,
Prudential Hong Kong Limited



Edward Moncreiffe

CEO,
HSBC Life (International) Limited



THE JUDGES



James Liu

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



Jeslyn Tan

President,
Singapore Insurance Institute (SII)



Jude Gomes

CEO,
Union Assurance PLC



Keith Richards

Chairman,
Financial Vulnerability Taskforce



Leopold Joseph O. Janer

Member of the Board of Trustees,
PIFAAP



Mark O'Dell

CEO,
Life Insurance Association of Malaysia

THE JUDGES



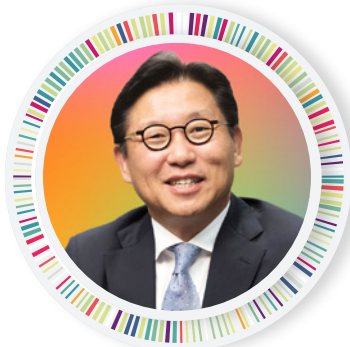
Mark V. T. Saunders

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



Matthew Kang Teck Wah, FBM

Chairman,
Asia Pacific Financial Services Association (APFinSA)



Michael Shin

CEO,
RGA Korea



Mohit Bhorla

Head of Agency, Digital Distribution and Marketing,
Allianz Asia Pacific



Paul Arrowsmith

President,
International LL Global, Inc.



Paul McNamara

Editorial Director,
Asia Insurance Review and Middle East Insurance Review



THE JUDGES



Rick Funke

International Head of Distribution Development,
LIMRA



Rico T. Bautista

President,
Philippine Life Insurance Association
President and CEO,
Etiqa Life and General Assurance Philippines



Rishi Srivastava

CEO of Group Agency Distribution,
AIA Group



Rotha Chan

CEO,
FWD Cambodia



Selina Lau

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



Shalini Pavithran

CEO,
The Malaysian Insurance Institute



Stephen Appleyard

Head of Distribution Hub Asia,
AXA



Steven Fong

General Manager, Distribution,
Sun Life Hong Kong Limited



Eligibility

- Entries and nominations are open to all relevant candidates operating in any markets in Asia.
- Participation in more than one category is allowed.
- The qualifying period for consideration is 1 January 2021 – 31 December 2021.

Application requirements

- Visit www.AsiaAdvisersNetwork.com/awards for more information.
- All entries must be in English and full nominations with supporting documents submitted by 14 April 2022.
- Nominations must be submitted at www.AsiaAdvisersNetwork.com/awards via the online form.
- All submissions should provide:
 - Your background and past achievements (up to 150 words)
 - Your achievements in 2021 (up to 150 words)
 - Specifically address each criterion, backed by examples and supporting documents. (500 words max)
 - The judging panel reserves the right to consider only applications that separately address each criterion in the selected award category.
 - The judging panel reserves the right to assess entries up to the indicated word limit above.
 - All write-ups should consist of text only. Visuals and pictures should be appended separately as supporting documents/attachments (see below).
- Supporting documents/attachments:
 - Should be included to back up assertions made in the submissions
 - Shall be limited to four pages. These will not constitute part of the word count.
 - May include client testimonials, official production records, proof of service to association/industry/society, academic qualifications, proof of activities and improvements.
- If participating in more than one category, the nomination write-up must be relevant and tailored to answering the criteria of the different categories. We reserve the right to consider the nomination for only one category should the write-ups be the same.

Nominations

Self-nominations

If you are nominating yourself or your own company, submit your entries with the full write-up and supporting documents via the online form by 14 April 2022.

Third-party nominations

If you are nominating another individual or another company, submit a 300-word statement summarising why the nominee would be a worthy recipient of the award by 31 March 2022. If the nomination is shortlisted, the Awards administrators will contact the nominee and invite them to submit a full application.

Judging

- The judging panel comprises eminent leaders and insurance professionals from the industry.
- There will be two rounds of judging by the panel: the first is by remote-scoring to select the finalists; the second will be a meeting of judges to deliberate and select the winners by secret ballot.
- The judging panel's verdict is final.
- The judging process will be audited by an independent auditor.
- The organisers reserve the right to publish information of winning entries given at nomination.
- The results will be kept confidential and winners will only be announced at the Virtual Awards Presentation Ceremony in 26 July 2022.

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



THE CATEGORIES

INSURANCE AGENT OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- What makes you unique compared to other agents?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2021 – MDRT, company awards, industry awards?

FINANCIAL ADVISER OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- What makes you unique compared to other advisers?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2021 – MDRT, company awards, industry awards?

ROOKIE INSURANCE AGENT OF THE YEAR

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

CRITERIA

- Provide a brief background on immediate past career and the reasons and motivations in making the switch to the insurance industry.
- Focus on what was done in 2021.
- What makes you unique compared to other advisers or agents?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2021 – MDRT, company awards, industry awards?

INSURANCE AGENCY LEADER OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- What makes you unique compared to other agency leaders?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2021 – number of managers promoted, number of MDRT producers, number of new agents/advisers, company awards, industry awards?



ROOKIE INSURANCE AGENCY LEADER OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- What makes you unique compared to other agency leaders?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2021 – number of managers promoted, number of MDRT producers, number of new agents/advisers, company awards, industry awards?

EMPLOYEE BENEFITS CONSULTANT OF THE YEAR

For the employee benefits consultant who has demonstrated expertise in providing customised solutions for organisations of different sizes with different talent management needs.

CRITERIA

- Focus on what was done in 2021
- In what ways have you demonstrated your expertise as an employee benefits consultant?
- How has your work helped different companies meet their different needs?
- Your performance in 2021 as an employee benefits consultant?

DIGITAL AGENT/AGENCY LEADER OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- What are the examples and results of what you have done on the digital front?
- How have digital initiatives driven your business?
- Your performance in 2021 as an agent/agency leader?

INSPIRATIONAL AGENT/LEADER OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- Why do you think – or why do others think – you are an inspiration?
- What are some of the key initiatives, examples and results of your CSR work?
- What are the odds you overcame to achieve success? How have you selflessly inspired other agents/managers to success or helped your clients?



THE CATEGORIES

LIFETIME ACHIEVEMENT

For the agent/leader who has more than 35 years of service to the industry and has made outstanding long-term contribution to enhancing the professionalism and image of the agency distribution force both company-wide and industry-wide.

CRITERIA

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

BANK PARTNER OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
 - What makes your partnership stand out from others?
 - What are the examples of key wins achieved as a result of this true partnership?
 - How did the partnership perform in 2021?
-

INSURTECH OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
 - How does the technology you provide help agents or advisers in the course of their work?
 - How unique or innovative is your initiative?
 - What evidence is there to show the improvements in results attained from using your technology?
-

DIGITAL TRANSFORMATION OF THE YEAR

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

CRITERIA

- What was the digital transformation initiative launched in 2021?
- How does the digital transformation initiative help agents or advisers in the course of their work?
- How unique or innovative is your initiative?
- What evidence is there to show the improvements in results attained from the initiative?



YOUNG EXECUTIVE OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- How have you gone out of your way to enhancing the interest and importance of advisers or agency distribution channel in your company and/or industry?
- How have you equipped agents or advisers with the necessary skills and expertise to continue to thrive in the changing multi-channel environment?
- What makes you stand out compared to other young executives?

EXECUTIVE CHAMPION OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- How have you gone out of your way to enhancing the interests and importance of the advisers or agency distribution channel in your company and/or industry?
- How have you equipped agents or advisers with the necessary skills and expertise to continue to thrive in the changing multi-channel environment?
- What makes you stand out compared to other executives?

EMPLOYEE BENEFITS PROVIDER OF THE YEAR

For the employee benefits provider with wide-ranging customisable solutions, to cater to the needs of organisations of different sizes with different talent management needs

CRITERIA

- Focus on what was done in 2021
- How are you helping your employee benefits consultants in serving their corporate clients?
- What indicators are there to show that your employee benefits solutions and consultants stand out from the rest?

INSURANCE COMPANY OF THE YEAR

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

CRITERIA

- Focus on what was done in 2021.
- How are you helping your agents enhance their professionalism, expertise and relevance in a multi-channel distribution world?
- What indicators are there to show how your agency force stands out from the rest?

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. Beacon produces television programming, directories, books and guides, as well. The media are all long established and have among the largest audience of "eyes" each month of any insurance business publishing group.

ASIA INSURANCE REVIEW

Member: Beacon International Group, Ltd. 

As we approach 31 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

ORGANISER



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

CO-ORGANISER



Since 1916, LIMRA has helped insurance and financial services leaders identify best industry practices, offering forums for discussion and to hear experts weigh in on the critical issues facing the industry. Today, we support more than 700 members in 53 countries worldwide through our study groups, committees, and conferences. At our core, we are a research organisation, offering actionable, credible insight into insurance and retirement trends. From sales and distribution benchmarking and product utilisation to in-depth analysis of consumer behaviour, carrier and advisor use of social media and technology, and regulatory changes, LIMRA's research programme continues to evolve and grow as our members' needs change.

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

www.limra.com

STRATEGIC PARTNER



AIA Group 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, New Zealand, the Philippines, South Korea, Sri Lanka, Taiwan (China), Vietnam, Brunei and Macau SAR(2), and a 49 per cent joint venture in India.

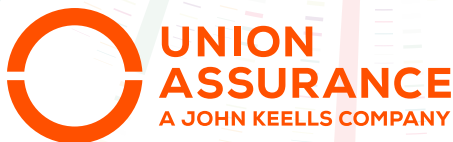
The business that is now AIA was first established in Shanghai more than a century ago in 1919. It is a market leader in Asia (ex-Japan) based on life insurance premiums and holds leading positions across the majority of its markets. It had total assets of \$330bn as of 30 June 2021.

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 39m individual policies and over 16m participating members of group insurance schemes.

AIA 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

SPONSOR



Union Assurance (UA) is one of the largest providers of life insurance solutions in Sri Lanka and is backed by the strength of John Keells Holdings, one of the largest conglomerates in the country.

UA offers a wide range of tailor-made insurance products and services that meet international standards. Its vision is to be the most sought-after provider of insurance solutions. In order to achieve its vision, UA constantly reviews its product portfolio to meet the ever-changing needs of its customers. With over 85 locations and over 3,400 well-trained personal financial advisers and sales staff, UA customers are direct beneficiaries of its exceptional reach and institutional stability.

The company has maintained an impressive track record of financial performance throughout its 33-year history, which is attributed to the innovative and customised solutions and services it offers to its existing and potential life insurance customers. UA also takes the lead in investing in cutting-edge technologies and takes pride in nurturing people with structured training and development initiatives.

UA continues to garner national and regional recognition for its sustainability, corporate governance, financial reporting, HR practices and overall business operations. Testament to its strong financial performance, UA became the only Sri Lankan company to make it to the ‘Forbes Best Under a Billion’ list in 2018 emerging from a list of 24,000 eligible companies in Asia, while also being recognised as the ‘Domestic Life Insurer of the Year’ at the Insurance Asia Awards in 2020.

An exceptional team of dedicated staff with an uncompromising dedication to excellence, a strong brand and an innovative product portfolio all combine to make UA a force within the insurance sector.

UA remains the trusted partner with whom its customers choose to work, and this partnership is its greatest achievement.

www.unionassurance.com

2021 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