



NOMINATION

# 8TH

## ASIA TRUSTED LIFE AGENTS & ADVISERS AWARDS 2023

### HOW TO ENTER

#### DEADLINE

**10 MARCH 2023 (THIRD-PARTY NOMINATIONS)**

**24 MARCH 2023 (SELF-NOMINATIONS)**

**JUDGING DAY 15 JUNE 2023**

**AWARDS CEREMONY 26 JULY 2023**

Organisers

 **Asia Advisers Network**

Member: Beacon International Group, Ltd. 

**ASIA  
INSURANCE REVIEW**

Member: Beacon International Group, Ltd. 

Co-Organiser



Strategic Partner



[www.AsiaAdvisersNetwork.com/awards](http://www.AsiaAdvisersNetwork.com/awards)



# SUPPORTING ORGANISATIONS



Asia Pacific  
Financial Services  
Association



Chartered  
Insurance  
Institute

**FPAS**  
FINANCIAL PLANNING  
Association Of Singapore



**HKFi**  
The Hong Kong  
Federation of Insurers  
香港保險業聯會



Persatuan Insurans Hayat Malaysia  
Life Insurance Association of Malaysia



## SCRUTINEER



[www.AsiaAdvisersNetwork.com/awards](http://www.AsiaAdvisersNetwork.com/awards)



# ORGANISER'S MESSAGE

## A NEW DAWN TO SHOWCASE EXCELLENCE

2023 is looking to be a recovery year for everyone and with these hopes of a new dawn, everyone from all industries is looking towards a restart after the challenging two years past. We are therefore very excited to be able to bring the 2023 Asia Trusted Life Agents and Advisers' Awards live in Singapore this year.

Despite the challenges of the last couple of years, agents and advisers have persevered with their passion and commitment to clients, and we saw such genuine efforts towards this end. We at *Asia Advisers Network (AAN)* are therefore even more excited and inspired to launch these year's awards to see how else agents can break barriers, now that the world has more or less returned to normal. We take our hats off to them for aiming for the stars and keeping the bar of excellence so high.

*AAN* and *Asia Insurance Review*, together with co-organiser LIMRA and strategic partner AIA, are indeed proud and humbled to be able to continue this journey in this, the 8th Asia Trusted Life Agents and Advisers Awards.

Agents and advisers remain such an integral and indispensable part of the industry. At *AAN*, we understand that the role of life agents and advisers is not just a job, but a calling. It requires a deep commitment to making a positive impact in people's lives by helping them plan for their financial future. We are proud to be associated with a team of professionals who embody this ethos every day.

These awards help to endorse and reward excellence for deserving candidates, and in its own humble way help to raise standards for the industry as a whole. Aside from the agents, companies behind them also should be saluted. The Asia Trusted Life Agents and Advisers Awards are a testament to the exceptional work that agents do and the trust that clients have placed on them. Their achievements are such a source of inspiration for the entire industry and a shining example of the value that a dedicated and knowledgeable life agent or adviser can bring to people's lives.

We would like to thank our esteemed panel of 16 judges, as well as the independent scrutineer KPMG for their commitment to this cause, not to mention the supporting associations as well. I am most grateful to Mark Tucker, our patron for so many years for his continuous support and belief in this cause.

So nominate and show the industry what you have done and how you can motivate your peers as well. This is just the beginning. The world is changing at a rapid pace, and we must continue to evolve and adapt to meet the evolving needs of clients. Let us embrace this challenge and continue to strive for excellence in all that we do.

We look forward to welcoming the entries this year. All the best, may your careers continue to flourish and may 2023 be a great year for all of you.



**Sheela Suppiah**

CEO,  
Asia Insurance Review,  
Middle East Insurance Review and  
Asia Advisers Network

# PATRON'S MESSAGE

## CELEBRATING THE IMPACT AND ACHIEVEMENTS OF AGENTS AND ADVISERS

Global economic and geopolitical uncertainty have been major themes of the past 12 months and are likely to remain so. Looking back, we launched the 2022 awards amid ongoing concerns relating to the COVID pandemic and shortly before Russia's invasion of Ukraine. The outbreak of war in Europe was first an urgent humanitarian crisis and second a seismic event for the global economy, given the impact it has had on supply chains, commodity prices and inflation. This has only added to the COVID-related challenges that remain with us.

However, despite the uncertainties, and in particular as a result of China's reopening, it is possible to be more optimistic about the global economy in 2023. Our industry continues to play a vital role in the global economic recovery as an important source of long-term investment capital, risk management and pioneering products and technologies.

In addition, as consumers have grappled with the real-life implications of these macroeconomic issues, agents and advisers have once again been there to help them ensure they have the right protection for their families and themselves.

I am delighted that it will be possible to recognise the many important achievements of our industry in person in Singapore later this year. Agents and advisers have always been the engine of our industry. They are trusted sources of help and advice to our customers. They provide peace of mind in trying times and employ cutting-edge digital products and services to provide the right coverage to meet customers' needs. They continue to strengthen communities, help to close the protection gap and enable our industry to grow.

I would like to offer my sincere thanks to *Asia Insurance Review* and *Asia Advisers Network* for helping us to recognise the many important achievements of our colleagues.



**Mark Tucker**

Group Chairman,  
HSBC Holdings plc

## THE JUDGES



**Bosco Lau**

Managing Director,  
Asia LOMA & LIMRA



**Chandana Aluthgama**

Vice President, Insurance Association  
of Sri Lanka  
CEO, Sri Lanka Insurance  
Corporation Ltd



**Darren Thomson**

CEO, South Asia and International  
Head of Bancassurance, LL Global  
(LOMA/LIMRA)



**James Liu**

Honorary Chairman,  
Insurance and Financial Practitioners  
Association of Taiwan  
Chairman, Phew Inc.



**Jensen Siaw**

Chief Learning Officer,  
LearnAply Pte Ltd (JSI Group)



**Kenny Siu**

Regional Director, HK & Asia Pacific  
The Chartered Insurance Institute of  
Hong Kong Ltd



**Linda Kho**

Regional Chief Agency Officer,  
Group Agency Distribution (GAD)  
of AIA Group



**Mark O'Dell**

Chief Executive Officer,  
Life Insurance Association of Malaysia



**Matthew Kang**

Chairman,  
Asia Pacific Financial Services  
Association (APFinSA)

## THE JUDGES



**Michael Chen**

President,  
Financial Services Managers  
Association (FSMA)



**Paul McNamara**

Editorial Director,  
Asia Insurance Review &  
Middle East Insurance Review



**Rico T Bautista**

President,  
Philippine Life Insurance Association,  
Inc (PLIA)



**Samantha Wong**

Chief Executive Officer,  
Financial Planning Association of  
Singapore



**Selina Lau**

Chief Executive Officer,  
The Hong Kong Federation of Insurers



**Sara Lamsam**

President, The Thai Life Assurance  
Association &  
CEO, Muang Thai Life Assurance Public  
Co Limited



**Sim Willing**

President,  
Insurance and Financial Practitioners  
Association of Singapore (IFPAS)

# HOW TO ENTER

## 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 2022 – 31 December 2022.

## APPLICATION REQUIREMENTS

- Visit [www.AsiaAdvisersNetwork.com/awards](http://www.AsiaAdvisersNetwork.com/awards) for more information.
- All entries must be in English and full nominations with supporting documents submitted by 24 March 2023.
- Nominations must be submitted at [www.AsiaAdvisersNetwork.com/awards](http://www.AsiaAdvisersNetwork.com/awards) via the online form.
- All submissions should provide:
  - Your background and past achievements (up to 150 words)
  - Your achievements in 2022 (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 24 March 2023.

### 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 10 March 2023. 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 2023.

If you have further questions, email [lifearwards@asiainsurancereview.com](mailto:lifearwards@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 2022.
- What makes you unique compared to other agents?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2022 – 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 2022.
- What makes you unique compared to other advisers?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2022 – 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 2022.
- 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 2022 – MDRT, company awards, industry awards?

# THE CATEGORIES

## 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 2022.
- What makes you unique compared to other agency leaders?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2022 – 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 2022.
- What makes you unique compared to other agency leaders?
- In what ways did you contribute to your company, industry or society?
- Your performance in 2022 – 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 2022
- 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 2022 as an employee benefits consultant?

# THE CATEGORIES

## 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 2022.
- 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 2022 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 2022.
- Why do you think – or why do others think – you are an inspiration?
- What are some of the key initiatives, examples and results of your CSR work?
- What are the odds you overcame to achieve success? How have you selflessly inspired other agents/managers to success or helped your clients?

## LIFETIME ACHIEVEMENT

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

### CRITERIA

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

# THE CATEGORIES

## BANK PARTNER OF THE YEAR

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

### CRITERIA

- Focus on what was done in 2022.
- 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 2022?

## HEALTH INSURANCE AGENT OF THE YEAR

For the agent who has best demonstrated a thorough understanding of their clients' health insurance needs, outstanding performance track record and an expert knowledge of the products and services available.

### CRITERIA

- Focus on what was done in 2022
- What makes you unique compared to other advisers?
- In what ways did you solve real problems for clients?
- How have you ensured that your business will continue to grow this year?

## 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 2022?
- 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?

# THE CATEGORIES

## 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 2022.
- 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 2022.
- 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 2022.
- 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?

# THE CATEGORIES

## 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 2022.
- 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

### ASIA INSURANCE REVIEW

Member: Beacon International Group, Ltd. 

*Asia Insurance Review (AIR)* is entering its 32nd year of circulation and continues its dedicated service to the industry, still hailed as the “Voice of Asia” and the “Must-Read Market Leader”.

*AIR* is 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, CFO Summit, Brokers’ Summit, China Rendezvous and the Takaful Rendezvous, *AIR* also seeks to engage market leaders in raising the bar of excellence via our series of Awards ceremonies including the Asia Trusted Life Agents and Advisers Awards, the Asia Insurance Industry Awards and our Middle East Insurance Industry Awards.

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)

### Asia Advisers Network

Member: Beacon International Group, Ltd. 

*Asia Advisers Network (AAN)*, launched in 2016 to meet the information needs of advisers and agency leaders across Asia Pacific, has developed into a leading dedicated online platform with a dedicated following. *AAN* reports on the latest industry news, development and expert content from leading minds across the industry, through multi-media channels to help advisers and agency leaders thrive and excel, equipping them with tools to stay ahead of trends. The *AAN* network has also facilitated the development of excellence for agents via the highly acclaimed Asia Trusted Life Agents and Advisers Awards, now entering its 8th year.

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 as well as the true soldiers of the industry, its agents.

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

## ORGANISER



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.

<https://big.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](http://www.limra.com)

## STRATEGIC PARTNER



AIA Group Limited and its subsidiaries (collectively “AIA” or the “Group”) comprise the largest independent publicly listed pan-Asian life insurance group. It has a presence in 18 markets – 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 US\$302 billion as of 30 June 2022.

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 40 million individual policies and over 17 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)

# 2022 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