

2nd Annual APAC Bancassurance & Affinity Marketing

9 – 10 April 2013, Kuala Lumpur

PRESTIGIOUS SPEAKER PANEL

Leonardo Zanolini, HSBC Amanah Takaful (TBC), Malaysia
Chief Operating Officer

Vikas Rajpal, Deutsche Bank, India
Product Head Bancassurance

Bob Leung, UBS, Hong Kong
Managing Director, Head of Asia Insurance Research

Lim Cheng Guan, Standard Chartered, Malaysia
Head of Bancassurance

Prof. Madya Dr. Engku Rabiah Adawiah Engku Ali

Bank Negara Malaysia (Central Bank)
Member of Shariah Advisory Council (SAC)

J.P. Anthony S. Parungao, Bank of the Philippine Islands, Philippine
Bancassurance Head and Preferred Banking Segment Head

Bill Lisle, AIA (TBC), Malaysia
Group Chief Distribution Officer

Priya Ranjan, AIA (TBC), Thailand
Head of Bancassurance

Prasanna Patil, AXA, Hong Kong
Regional Head of Corporate Development and Partnership

Giancarlo Scupino, Mondial Assistance, Malaysia & Singapore
CEO

Rod Shay, Swiss Reinsurance Company, Hong Kong
Head of Distribution Solutions/ Director

Ramon Fernandez, Zurich Topas Life, Indonesia
Director, Head of Partnership Distribution

Darren Thomson, Manulife, Singapore
Asia Regional Head, Strategic Channel Development

Jeffrey Manuel, Manulife, Singapore
Head of Asia Bancassurance & Partnership Development

John McPhee, Chartis Asia Pacific, Singapore
Regional Senior Vice President

Rajendra Ghag, HDFC Life, India
Senior Executive Vice President & Chief Human Resources Officer

Anup Rau, HDFC Life, India
Senior Executive Vice President, Bancassurance & Alternative Channels

Mark Anthony Nathan, Takaful Malaysia
General Manager

Hugh Terry, The Digital Insurer, Singapore
Editor

Sohail Jaffer, FWU Global Takaful Solutions, UAE
Deputy CEO

Peter Magdy, Egyptian Takaful Life, Egypt
Chief Sales & Marketing Officer

Nirmal Bhattacharya, Magma HDI General Insurance Company, India
Vice President-Head-Underwriting

Amy Pang, Tune Insurance Holding, Malaysia
Head of Marketing

Krishan Mishra, TIL Limited (Insurance Vertical), India
Head of Insurance

ADVISORY PANEL

Bobby Kusnandar, Standard Chartered Bank, Indonesia
Head of Bancassurance

Priya Ranjan, AIA, Thailand
Head of Bancassurance

Raymond Tan, CIMB, Singapore
Head of Bancassurance

Sasitharan Krishnan, Tune Insurance Holding, Malaysia
General Maganer

Mark Anthony Nathan, Takaful Malaysia
General Manager,

EVENT INTRODUCTION

Bancassurance is very significant in many ways in Asia, with having access to banks being a business differentiator in many cases. In this truly competitive world, insurers have been compelled to follow multiple means and channels to improve distribution of insurance products across the region productively.

The Bancassurers believe that they have to understand the client's needs to offer products that are offered based on innovation and creativity. This is not possible unless they have striking strategies to interest the clients and to develop the market. A distinctive dynamic distribution planning should be considered for both banks and insurance companies to team up for future success and to make their visions come true. In the forum there are unique opportunities for networking, strategic discussions and sharing ideas.

EVENT FOCUS:

- ▶ Alteration of Bancassurance Models
- ▶ Comprehensive Overview on Distribution Channels
- ▶ Strategic Profit Improvement Methods
- ▶ Reacting to Changing Risk Appetite
- ▶ The Role of Technology and Innovation
- ▶ Consumer Behavior in the Current Market
- ▶ Defining a Sustainable Development Model
- ▶ Strategies for a Better Future

WHO WILL ATTEND

CEOs, CMOs, COOs, Vice Presidents, Managing Directors, General/ Global Directors, Heads of: Bancassurance, Channel Distribution, Life & Non-life Products, Product Development, Pricing, Underwriting, Strategic Marketing & Innovation, Sales, Finance, Financial Advising Services, Solution Providers, Banks, Management Consultants, Insurance Regulators, Customer Relationship & Segmentation, Solution Providers & Researchers

Day 1, 9th April 2013

8:30 Registration and Tea/Coffee

9:00 Welcoming note from Fleming Gulf

9:05 Opening remarks from the Event Chair

9:15 Power Networking Session

▶ Practical Strategies & Emerging Trends

9:30 ▶ KEYNOTE **Managing the Bancassurance Relationship: A New Era of Financial Product Distribution**

- Insurers' dilemma
- Deregulating environment vs Integrated financial product distribution
- How to capture maximum value?
- Questions and Answers

Bob Leung, UBS, Hong Kong
Managing Director, Head of Asia Insurance Research

10:10 **Building superior customer loyalty by providing assistance in their critical life challenges**

- Assistance Services from A to Z
- How Can We Better Help Insurers to Detect Your Customer Needs and Gain Their Trust
- Following the Life Stages of Your Customers and Being Present in Their Most Critical Moments

Giancarlo Scupino, Mondial Assistance, Malaysia & Singapore, CEO

10:50 Morning Refreshment and Networking Session

11:20 **Key Success Factors in Strategic Planning**

- The Importance of CRM Techniques/Tools
- Customer Service and Long-lasting Satisfaction
- Integration of Bank and Insurer; Process Management
- Questions and Answers

J.P. Anthony S. Parungao
Bank of the Philippine Islands, Philippine
Bancassurance Head and Preferred Banking Segment Head

12:00 ▶ PANEL DISCUSSION **An Asia-Pacific Tour of Bancassurance**

- Principal Component Analysis in the Financial Market
- Is There a Model for Sustainable Development?
- New Markets in Bancassurance

12:40 Networking Luncheon

14:00 ▶ CASE STUDY **The Lessons of Asian Experience in Banking and Insurance Collaboration**

- Disagreements with agreements

- Setting up the partnership with a short term view
- Partnership (mis)management

Ramon Fernandez, Zurich Topas Life, Indonesia
Director, Head of Partnership Distribution

14:35 **Nuances of Underwriting in Bancassurance Business**

- Underwriting Prudence in Bancassurance
- Underwriting of General Insurance Products in Bancassurance
- Risk Management in Bancassurance

Nirmal Bhattacharya, Magma HDI General Insurance Company, India
Vice President-Head-Underwriting

▶ Manpower Planning and Talent Management in Bancassurance

15:10 **Effective HR Strategies for the Sales Network**

- The necessity of Defining Leadership Models
- How to Retain Top Talent in a Competitive Market
- Training Strategies for Long-Lasting Results
- Motivational Techniques
- Questions and Answers

Rajendra Ghag, HDFC Life, India
Senior Executive Vice President & Chief Human Resources Officer

15:45 Afternoon Coffee and Networking

▶ Best Practices in Bancassurance

16:15 **How a Reinsurer Can Enhance Bancassurance Distribution?**

- Distribution Solutions
- Innovation in Bancassurance
- Beyond Bancassurance
- Questions and Answers

Rod Shay, Swiss Reinsurance Company, Hong Kong
Head of Distribution Solutions/ Director

16:50 ▶ PANEL DISCUSSION **Comprehensive Overview on Distribution Channels and Working Strategies**

- Right Distribution Channels: ATM, E-Insurance, Platform Banking, Inbound Tele-calls, Direct Mailers
- Differing Philosophies towards Selling
- Client Targeting/Needs Analysis
- The Importance of Communication between Channels
- Key Issues in Channel Leadership Success

17:30 Closing Remarks from the Chair

Speakers and delegates are cordially invited to attend a
NETWORKING COCKTAIL RECEPTION

Day 2, 10th April 2013

8:30 Registration and Tea/Coffee

9:00 Opening Remarks from the Chair

▶ Islamic Approach

9:10 Bancatakaful: Integrating Takaful within the Bancassurance Model

- Customer Acceptance and Process Innovation on Bancatakaful
- Wonderful Market Potentials for Bancatakaful
- Competitive Advantage of Bancatakaful
- Questions and Answers

Prof. Madya Dr. Engku Rabiah Adawiah Engku Ali
Bank Negara Malaysia (Central Bank)
Member of Shariah Advisory Council (SAC)

9:45 Comparative review of Conventional & Takaful Bancassurance Models

- Describing both business models
- Comparative advantage
- How best synergies can be achieved
- Questions and Answer

Mark Anthony Nathan, Takaful Malaysia
General Manager

10:20 Morning Refreshment and Networking Session

10:50 Bancatakaful: Challenges and Opportunities

- Product innovation: Customer segmented approach, built around lifestyle needs
- Sharia compliant Multi manager investment strategies
- Enhanced Customer service: Increasing use of Digital applications

Sohail Jaffer, FWU Global Takaful Solutions, UAE
Deputy CEO

11:25 ▶ PANEL DISCUSSION What will be the direction of bancatakaful in a going forward?

- Effective Management System
- Analysis for Market Planning
- Market Trends and Consumer Behavior

▶ Alternative Innovations and Technologies: Agility and Cost-Effective Models

12:00 Effective Use of Technology: Mobile & ATM Bancassurance

- The Necessity of Merging Traditional and Modern Marketing Channels
- What Mobile Technology Is Able to Create?
- Branding through ATM Channels
- Questions and Answers

Leonardo Zanolini, HSBC Amanah Takaful (TBC), Malaysia, Chief Operating Officer

12:35 Networking Luncheon

13:55 Think digital – and transform your Bancassurance business

- Some of the problems with existing Bancassurance models
- How digital thinking can help
- How radical are you prepared to be ?
- Questions and Answers

Hugh Terry, The Digital Insurer, Singapore
Editor

▶ Growth of Bancassurance

14:30 Fueling the growth of Bancassurance through greenfield strategies

- Corporate and Commercial Bancassurance
- Mobile Insurance Specialist
- Virtual Relationship Management
- Questions and Answers

Darren Thomson, Manulife, Singapore
Asia Regional Head, Strategic Channel Development
Jeffrey Manuel, Manulife, Singapore
Head of Asia Bancassurance & Partnership Development

15:05 Factors Influencing the Growth of Bancassurance across Asia-Pacific

- Core Element of the Customer Proposition
- Increased Regulation; Increasing Cost and Complexity
- Focusing on Rebuilding Core Business
- Questions and Answers

Vikas Rajpal, Deutsche Bank, India
Product Head Bancassurance

15:40 Afternoon Coffee and Networking

16:10 Challenges to Move from a Product Centric to a Customer Centric Organization

- The role of Effective Market Analysis in Improving Distribution Management
- Growing Effect of Regulation on Distribution Management
- Achieving Producer Efficiency Management
- Questions and Answers

John McPhee, Chartis Asia Pacific, Singapore
Regional Senior Vice President

16:45 ▶ CASE STUDY Evolution of Bancassurance in Egypt

- Changing landscape for Bancassurance in the Egyptian market
- What are Banks looking when partnering with insurers ?
- Shifting gears between Bancassurance & Bancatakaful, will it work ?
- Questions and Answers

Peter Magdy, Egyptian Takaful Life, Egypt
Chief Sales & Marketing Officer

17:20 Closing Remarks from the Chair

