

# 15<sup>th</sup> Bancassurance Asia Summit 2023

31 OCTOBER - 3 NOVEMBER 2023, SINGAPORE



## Main Summit Day One - 1 November 2023

8.30am

Registration & Welcome Coffee

8.50am

Welcome Address by Chairperson

**Doug Sumner**  
*Principal,*  
**Shoreline Asia**

9.00am

Developing an Effective Bancassurance Partnership  
Aligned to Business Objectives

**Vishal Sharma**  
*Joint President - Bancassurance  
& Strategic Alliances,*  
**HDFC-ERGO General Insurance**

9.45am

Success Factors of Effective & Sustainable  
Bancassurance Partnerships & Business Units

**Calvin Foo**  
*Founder, Results Rocketeer;  
Former Regional Director of  
Partnership Distribution, AIA*

10.30am

Optimizing Digital Bancassurance  
Product Development & Distribution

**Anjana Rao**  
*Former Senior Vice President,  
Digital and Direct Sales,*  
**IndiaFirst Life**

11.15am

Morning Tea & Networking Break

11.35am

Driving Customer Centricity in Bancassurance as a  
Differentiating Factor and Value Proposition

**Doug Sumner**  
*Principal,*  
**Shoreline Asia**

12.20pm

Innovating Digital Bancassurance to  
Accelerate Customer Acquisition

**John Spence**  
*Managing Director,*  
**Asian Capital Advisors**

1.05pm

Lunch & Networking Break

2.05pm	<p style="text-align: center;"><b><u>Panel Discussion:</u></b></p> <p style="text-align: center;"><b>Adapting to the Evolving Regulatory &amp; Competitive Market Landscape of Bancassurance Industry</b></p>	<p style="text-align: center;"><b><u>Moderator:</u></b></p> <p style="text-align: center;">Doug Sumner, <i>Principal, Shoreline Asia</i></p> <p style="text-align: center;"><b><u>Panelists:</u></b></p> <p style="text-align: center;">John Spence, <i>Managing Director, Asian Capital Advisors</i></p> <p style="text-align: center;">Erickson Mangunsong, <i>Technical Director, Asuransi Etiqa Internasional</i></p> <p style="text-align: center;">Calvin Foo, <i>Founder, Results Rocketeer; Former Regional Director of Partnership Distribution, AIA</i></p>
2.50pm	<p style="text-align: center;">Engaging in Product Development and Differentiation to Match Evolving Customer Needs and Preferences</p>	<p style="text-align: center;"><b>Rita El Sokhon</b> <i>Chief Operating Officer,</i> <b>Bancassurance SAL</b></p>
3.35pm	<b>Afternoon Tea &amp; Networking Break</b>	
3.55pm	<p style="text-align: center;"><b><u>Panel Discussion:</u></b></p> <p style="text-align: center;"><b>Key Considerations in Selecting the Right Bancassurance Strategy &amp; Partnerships including Digital</b></p>	<p style="text-align: center;"><b><u>Moderator:</u></b></p> <p style="text-align: center;">Doug Sumner, <i>Principal, Shoreline Asia</i></p> <p style="text-align: center;"><b><u>Panelists:</u></b></p> <p style="text-align: center;">Grzegorz Kaliszuk, <i>Head of Investment Product Department, Phinance S.A</i></p> <p style="text-align: center;">Darren Thomson, <i>International Head of Bancassurance and Regional CEO, South Asia, LIMRA and LOMA</i></p> <p style="text-align: center;">Vishal Sharma, <i>Joint President - Bancassurance &amp; Strategic Alliances, HDFC-ERGO General Insurance</i></p>
4.40pm	<p style="text-align: center;">Successful Bancassurance Strategy &amp; Partnership Development - Best Practices</p>	<p style="text-align: center;"><b>John Spence</b> <i>Managing Director,</i> <b>Asian Capital Advisors</b></p>
5.25pm	<b>Closing Address &amp; End of Main Summit Day One</b>	

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## Main Summit Day Two - 2 November 2023

8.30am

Registration & Welcome Coffee

8.50am

Welcome Address by Chairperson

**Doug Sumner**  
*Principal,*  
**Shoreline Asia**

9.00am

Transforming Bancassurance for Success  
in the Digital Age

**Erickson Mangunsong**  
*Technical Director,*  
**Asuransi Etiqa Internasional**

9.45am

Integrating Bank & Insurance's Operating Models for  
Optimal Bancassurance Partnership & Performance

**Jeffrey Manuel**  
*Regional Chief Partnership Officer,*  
**Allianz Asia Pacific**

10.30am

Developing a Successful  
Digital Bancassurance Strategy

**Doug Sumner**  
*Principal,*  
**Shoreline Asia**

11.15am

Morning Tea & Networking Break

11.35am

Building Customer Experience Through  
Digital Channels Whilst Enhancing Your Online  
Bancassurance Branding and Market Positioning

**Anjana Rao**  
*Former Senior Vice President,*  
*Digital and Direct Sales,*  
**IndiaFirst Life**

12.20pm

Bancassurance Model Coming Under Pressure?  
Key Issues to Consider in 2024 and Beyond

**Doug Sumner**  
*Principal,*  
**Shoreline Asia**

1.05pm

Lunch & Networking Break

2.05pm	Gaining Insights into Proven Distribution Strategies so as Capitalize on Emerging Bancassurance Markets	<p><b>Darren Thomson</b>  <i>International Head of Bancassurance and Regional CEO, South Asia,</i>  <b>LIMRA and LOMA</b></p>
2.50pm	Distributing Market-Creating Digital Bancassurance	<p><b>Rehan Butt</b>  <i>Digital, Micro and Inclusive Insurance Practitioner</i></p>
<p><b>3.35pm</b> <b>Afternoon Tea &amp; Networking Break</b></p>		
3.55pm	Bancassurance vs The role of Independent Financial Intermediaries in the Distribution of Investment Products: Awareness, Product Offer, Distribution	<p><b>Grzegorz Kaliszuk</b>  <i>Head of Investment Product Department,</i>  <b>Phinance S.A</b></p>
4.40pm	Developing Innovative & Customer Driven Insurance Products that Complement with Your Portfolio	<p><b>Ramneet Pal Singh Walia</b>  <i>CEO Asia,</i>  <b>Preferred Global Health</b></p>
5.25pm	<p><b>Closing Address &amp; End of Main Summit Day Two</b></p>	

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## Post-summit Workshops - 3 November 2023

### WORKSHOP D:

**8.30am - 11.00am**

\*Attendee Registration  
at 8.30am;

actual workshop starts  
at 8.45am

### Leveraging Digital Technology & Channels to Optimize Bancassurance Sales Distribution Performance

#### Workshop Leader:

**Rehan Butt**, *Digital, Micro and Inclusive Insurance Practitioner*

*Rehan is a seasoned insurance professional with a strong entrepreneurial mindset. Throughout his career, he has gained extensive experience of working across diverse markets in Asia, Africa and Middle East. Rehan's expertise spans various areas, including startup creation, B2B, B2B2C, and B2G sales, scalability and driving profitability.*

*Rehan's background encompasses working closely with insurers, reinsurers, and insurance brokers, holding significant leadership roles such as CEO, CCO, VP - International, Group Business Director, Country Manager, Board Member, and EXCO Member. Over the years, he has successfully marketed and sold a wide range of insurance products, including life, health, personal lines, P&C, disaster risk and agriculture insurance. The organizations Rehan has been associated with include Alico AIG Life, MetLife, ACR ReTakaful, MicroEnsure, MIC Global and more currently Pula Advisors AG.*

*As a subject matter expert, Rehan is frequently invited to speak at prestigious industry events, sharing his knowledge and perspective. Additionally, he contributes to the field of digital, micro and inclusive insurance through authoring thought leadership articles that have been published in reputable business newspapers.*

### WORKSHOP E:

**11.15am - 2.45pm**

(Including 1 hour  
Lunch Break)

\*Attendee Registration  
at 11.15am;

actual workshop starts  
at 11.30am

### Creating A Digital Bancassurance Ecosystem for the Optimum Partnership Outcome

#### Workshop Leader:

**Calvin Foo**, *Founder, Results Rocketeer; Former Regional Director of Partnership Distribution, AIA*

*Calvin Foo is an Insurance Distribution Expert with 3 decades of insurance & banking experience.*

*He has trained, coached & mentored more than 20,000 CAOs, CPDOs, distribution leaders & professionals. His successes in multiple financial services industries include Life Insurance (Agency, Bancassurance, Broker, HNW), General Insurance (Accident & Health, Worksite Marketing) & Private Banking (Life Insurance). He is also skilled in multiple disciplines including strategy development, channel & sales management & capability development across 15 markets in Asia-Pacific.*

*His professional senior appointments included being the CEO, Southeast Asia, JLT Private Client Services, Regional Head of Partnership Academy, Director of Institutional Bancassurance with AIA, Director, Wealth Planning Life Insurance with UBS, Asia Regional Head, Financial Advisory & HNW Development with Manulife Financial amongst others.*

### WORKSHOP F:

**3.00pm - 5.45pm**

\*Attendee Registration  
at 3.00pm;

actual workshop starts  
at 3.15pm

### Leveraging Digital Channels Effectively for Bancassurance to Drive Profitability

#### Workshop Leader:

**Darren Thomson**, *International Head of Bancassurance and Regional CEO, South Asia, LIMRA and LOMA*

*Darren Thomson joined LIMRA and LOMA in 2022 as Regional CEO, South Asia, where his deep knowledge of the agency and banca channels will help to guide the business in Australia, Cambodia, Indonesia, Laos, Malaysia, Myanmar, New Zealand, Singapore, Thailand and Vietnam. In addition, he also serves as the International Head of Bancassurance where he provides subject matter expertise and leadership for the Banca channel globally.*

*Prior to joining LIMRA and LOMA, Darren was on secondment to AIA Thailand in a number of strategy and advisory roles, positions he assumed after serving in AIA Group Office positions in the Strategy & Corporate Development Department of AIA Group Office, CEO of Group Partnership Distribution, and Regional Head of Business Development & Special Projects.*

*He is a Fellow of the Institute of Banking and Finance (IBF Singapore), received a Master Financial Controller Diploma from the American Academy of Financial Management, and is a past Vice President and President of the Life Insurance Association Singapore.*