

15th Bancassurance Asia Summit 2023

31 OCTOBER - 3 NOVEMBER 2023, SINGAPORE



EXPERT SPEAKERS PROFILE



John Spence
Managing Director,
Asian Capital Advisors

John Spence is an international insurance and wealth management executive who has operated across Asia, Australia and North America in executing mergers and acquisitions, launching innovative customer offers, enabling distribution partnership and advancing digital initiatives.

John has been based in Hong Kong since 2000 with business leadership and corporate governance roles at Generali Asia, Keefe, Bruyette & Woods (KBW), Macquarie Funds Group and Manulife Financial. Prior to 2000, John was with Manulife Financial in Canada, and National Australia Bank, Colonial Mutual, AMP Society and KPMG in Australia.

John holds a Masters of Business Administration (MBA) from Australian Graduate School of Management (AGSM) at the University of New South Wales Business School, Bachelor of Economics (BEC) from Sydney University, is a Fellow Chartered Accountant Australia and New Zealand (FCA ANZ), Certified Financial Planner (CFP) Australian Institute of Company Directors (FAICD) and the Hong Kong Institute of Directors (FHKIoD).

Currently, John is the Managing Director of Asian Capital Advisors, a boutique strategic advisory firm focused on cross border insurance and wealth management transactions and partnerships in Asia.



Doug Summer
Principal,
Shoreline Asia

Doug is the Chairperson of RedPear, a Whatsapp based Insurtech based in Ghana and Chief Marketing Partner for Riverside Asia NL a Netherlands based organisation that specializes in direct insurance distribution.

Doug is also a principal of Shoreline Asia, a consultancy that specializes in Bancassurance deal structuring, process improvement and M&A in the Bancassurance space. Doug travels extensively around the Asia Pacific, Middle East and Africa regions consulting to Banks and Insurance companies on matters such as: Bancassurance, Organisational Strategy and Product and Distribution strategy.

For over 15 years Doug has also run several highly respected Masterclasses covering matters such as Bancassurance, Insurance Product Development, Retail Banking Product Development and so on, during which time he has trained and advised literally hundreds of executives from Banks and Insurance companies across Asia Pac, The Middle East and Africa. Doug also advises a number of major Not for Profits, Trusts and Foundations on their investments and various other matters around governance and strategy for their capital. Doug is very well known and respected for his thought leadership in financial services and Bancassurance in particular.



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

Mr Vishal Sharma is currently designated as Joint President at HDFC ERGO General Insurance Company Limited and is responsible for Bancassurance & Strategic Alliances functions of the company.

He has over 20 years of experience and was also previously held the roles of Group Head Bancassurance, EVP-Retail Business amongst other roles with the company. He also had 8 years of relevant experience with ICICI Lombard, a leading insurance company in India.



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

Jeffrey Manuel is the Chief Partnership Officer for Allianz Asia Pacific. He is responsible for all regional Bancassurance and Partnership channels across both Life & Health and Property & Casualty businesses.

Jeffrey joined Allianz Asia Pacific in 2020. During this time, he has successfully led the rollout of next generation Partnership transformation across all entities in Asia driving profitable and sustainable growth.

With over 25 years of experience in senior leadership roles in multinational corporations such as Citibank, Manulife and AIA, Jeffrey has extensive experience and a good track record in the areas of sales and distribution, business transformation, M&A, strategic planning and operational excellence



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

Calvin is the Founder and Sales Productivity Expert of Results Rocketeer.

He has over 30 years of transformative experience in the insurance and banking industries with his multi-distribution experience spanning Agency, Bancassurance and IFA channels across 16 APAC markets, 22 retail banks and 7 private banks.

Known for being a results-producing strategist and practitioner, Calvin has driven companies to achieve high double-digit growth, through harmonising proven strategies with global best practices drawn from diverse industries, within & outside the financial industry.

A trailblazer of the insurtech movement, he is focused on Distribution of the Future (DotF), leveraging on technology, digital ingenuity and cutting-edge A.I. to propel leaders and advisors to achieve greater and faster results. He has enabled more than 20,000 advisors & leaders achieve their financial goals. A happily married family man with two sons, Calvin's personal mantra is to "Develop People to be the Best Versions of Themselves".



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. Before joining AIA, Darren also held senior positions at other leading financial services institutions in the United Kingdom and Asia, including Regional Head of Strategic Channel Development at Manulife Financial and the Regional Head of Partnership Distribution and Wealth Management in Manulife Hong Kong; President and CEO at Manulife (Singapore) Pte., Ltd; Chairman and founder Manulife Asset Management Singapore; Chief Partnership Distribution Officer at Prudential Assurance Company in Hong Kong; Regional Head of Bancassurance Prudential Assurance Asia and Regional Executive at Prudential Assurance Company, UK.

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.



Erickson Mangunsong
*Technical Director,
Asuransi Etiqa
Internasional*

Erickson is currently the Technical Director at Etiqa Insurance Indonesia responsible for Underwriting, Reinsurance & Claims.

His professional titles include ACII (Associateship Chartered Insurance Institute) and CRGP (Certified Risk Governance Professional). He holds a Master Degree in International Business Administration, Post Graduate Diploma in Insurance Studies and Degree in Information Technology Management.

His previous roles held including the Technical & Operations Director at Indonesia Re, Technical & Marketing Director at Asuransi ASEI, Director at Aon Reinsurance Brokers, Division Head at Adira Insurance & Astra Insurance



Ramneet Pal Singh Walia
CEO Asia,
Preferred Global Health

Mr. Ramneet has been a leader for 21 years in the healthcare and insurance industries. His impact can be felt across multiple countries through his work as the CEO of Preferred Global Health Asia. His work helps a wide range of public services from banks and hospitals to governance and businesses.

Successfully developed & implemented Regional/Global programs in multiple countries with banks, insurer, financial institutions, hospitals and healthcare providers including governance, project management/steering committee, business planning, digital plans and change management. Experience of managing local JV partners, distribution channel, International brokers in Asia with key partnership like HSBC Global, Bao Viet Vietnam, Bank Mandiri Indonesia, Citibank Asia, Tune Protect Group and others reputed groups in Asia. Experienced in setting up companies and regulatory approval for HK, India, Singapore, Indonesia, Philippines and China. Focused on Regional leadership assignment with Insurer with Health as key pillar to growth.



Grzegorz Kaliszuk
Head of Investment
Product Department,
Phinance S.A

Grzegorz is a Financial market practitioner with 17 years of experience in product management, projects implementation and sales network management.

Currently he is the Head of Investment Products Department at Phinance S.A and his previous roles include the Head of Sales, AgioFunds TFI S.A, Head of Bancassurance and Financial Intermediaries, Managing Director for Life & Health Products, Allianz Insurance Life and Non-Life Company.

He has been gaining and enriching my experience in investment fund and insurance industry in PZU - the biggest Central and Eastern Europe Insurance Group , Nordea, Allianz and Phinance – the biggest Polish multi product intermediary. He was participant in many international product and process projects.

He is an economic publicist and financial market commentator - author of more than 200 articles on capital market, investment fund market and insurance industry. Now, for over three years he is at Phinance S.A. responsible for creating an offer of investments products and managing sales force offering these products.



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.



Rita El Sokhon
Chief Operating Officer,
Bancassurance SAL

Ms. Rita El-Sokhon is currently the Chief Operating and Actuarial Officer at a leading player in the Lebanese insurance market, Bancassurance sal, where she has been working since 2004.

Rita is a member of the C-suite and of the Senior Management of the Company with a proactive contribution to developing and executing the company's business strategy and the bancassurance model. Ms. El-Sokhon is the President of the Lebanese Association of Actuaries since July 2022.

She is a fellow actuary in the French Institute of Actuaries and a member of the jury and the qualification committee. She obtained her BS in Actuarial Sciences from NDU and her master's degree as well as the actuarial diploma from ISFA, one of the most prestigious actuarial universities in France. Rita also holds many certificates such as the Corporate Directors Certificate - IFC.

She is also a lecturer at the top local universities in Lebanon. Rita worked at i.e. Muhanna & Co. Actuarial as an Actuarial Analyst and at Al-Itihad Al-Watani as an actuary.



Anjana Rao
*Digital Transformation and
Change Management
Leader and Former Senior
Vice President, Head Digital
and Direct Sales,
IndiaFirst Life*

Anjana's experience in Indian insurance spans for over 22 years. In her professional journey she has worked for life, non-life insurance companies, and also has been a part of consulting services.

She has been in leadership positions and has successfully driven innovation agenda. She has several highlights in her professional journey which include the following:

- *Proven expertise in Designing, Leading and Delivering large scale digital transformation programs for Life and Non-Life Insurance Carriers in India*
- *Proven experience in Bancassurance and enabling technology-based accelerators to drive penetration by enhancing attachment of insurance with banking processes in a seamless manner.*
- *Establishing Digital Business Unit for Insurance Carrier*
- *Infusing AI Driven insights for Core Insurance Processes to enhance employee experience and customer experience.*
- *Alliance and Partner ecosystem across Fintechs, OEMs and Systems Integrator*
- *Thought Leader, Speaker on multiple forums (30+) on topics pertaining to Digital Transformation for Insurance Industry, BFSI, Podcasts, Management institutes*
- *Proven experience of working closely with complex and large-scale Public Sector and Government Entities aligned to processes and policies*
- *Proven expertise in presales and consulting guiding sales team to identify white space and pitch relevant solution*
- *Proven experience in zero to one setup of technology solutions for a non-life startup to kick off business operations (IT Blueprint, Budget, Solution Evaluation, Implementation, setup of Data Center, DR Site, Call Center setup, Cloud Migration)*
- *Proven expertise in leading and managing IT Applications and Operations for insurance carrier in India*
- *Front ending customer discussions, leading presentations & negotiations on Value Proposition of Proposed Solution, Architecture, Data Analytics*
- *Go beyond presentations with MVPs*
- *P&L responsibility on large delivery programs*
- *Authored multiple articles (10+) for Banking Frontier, Financial Express and leading newspapers on Digital Strategy for Insurance enabled by AI / emerging technologies and impact on Insurance Business*
- *Won several (10+) distinguished industry awards for organizations for the solutions, including award for self*