

Maximising the impact of discussions around Wealth Solutions and HNW Insurance

3.00pm

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- Has the pandemic slowed the Asian life insurance market due to the difficulty of remote paperwork, difficulties in obtaining medical certificates and other impediments?
- How has the industry risen to the digital and logistical challenges and met the additional demand for security and family protection with state-of-the-art solutions?
- What types of solutions are in vogue today, what are the key differences, and why?
- Who is buying these solutions and how should bankers and advisors begin the conversation?
- How do wealth managers promote each of these solutions more effectively but also within the bounds of regulation/compliance?
- What about the major issue of funding policies and whether larger, more leveraged policies are advisable given the state of the financial markets and rates?
- How do the private banks and independent wealth management firms work with other key life insurance industry participants such as the specialist brokers/agents and distributors in the market?
- And how do they make money out of these relationships and partnerships?
- How does the wealth management community effectively connect life solutions to estate planning and to the facilitation of a smooth transition of wealth from policyholders to their chosen beneficiaries, and compliantly?
- What sort of training and education is required for any RMs or advisors to be able to promote these sophisticated products?
- Should the wealth industry be engaging the second and third generations in such discussions, and if so, how?
- How does the wealth industry work most effectively with other professionals, such as tax advisors, estate lawyers and others?

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4.00pm

Webinar Ends