

HNW Life Insurance – Trends and Opportunities

3.00pm

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- What is the current and expected life insurance market profile in Asia compared to other markets, such as Europe? And why?
- How do advisors even start thinking about how to help promote life insurance solutions amongst their private clients?
- Typically, and in very broad terms, how do advisors approach clients with very different levels of wealth, such as the USD8 million HNW client compared with the USD300 million UHNW client?
- Is there any specific product or value proposition that resonates with Single-Family Offices?
- How do these wealth managers garner sufficient knowledge the products to help clients start on the journey to choosing a plethora of different alternatives such as Whole Life, Term Life, Universal Life, Variable Universal Life, Indexed UL and Private Placement Life Insurance?
- How can advisors link life solutions to smart estate and legacy planning, and which are the most appropriate or relevant structures?
- Where does the wealth advisor stop and where do the specialist (and fully licensed) life insurance brokerages and specialists take over in order to advance these solutions for Asia's private clients?
- Very importantly, how do the advisors participate compliantly and legally in the fee income/commissions?
- Should the wealth advisors also engage the second and third generations in such discussions, and if so, how?
- What are some of the critical errors advisors and clients might make in the process?
- Does the average private banker or EAM RM/advisor understand enough about the life products and solutions, or what needs to happen to boost their knowledge, engagement and involvement? How can they sensibly impart that knowledge to their clients?
- What sort of relevant case studies can help illustrate some of these points?
- Does the engagement stop when the client purchases the solution, or should the advisors step in to help them if, for example, they move jurisdictions or their situations change in significant ways?

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4.00pm

Webinar Ends