

Association of Financial Advisers (Singapore)

Presents

GROUP INSURANCE WORKSHOP

"AN INTRODUCTION ON HOW TO BUILD A GROUP BUSINESS"



About the Workshop Speakers



Pat Toh joined Pan Resources Pte Ltd in year 1995. Starting as a Financial Advisor, she managed to build up a portfolio of 300 individuals within 4 years. In 1999, Pan Resources Pte Ltd decided to switch to group business specializing in employee insurances for corporates.

Pat was responsible for building and running the backroom operations as Chief Operating Officer (COO). She was also the compliance officer in Pan Resources.

Pan Resources became the biggest home grown insurance broker in employee insurances before it was acquired by CXA group in January 2014.

Pat has diploma in Life Insurance, diploma in General Insurance, diploma in Marketing and diploma in Australian and New Zealand Institute of Insurance & Finance (ANZIIF).

With Pat's wide expertise in all areas, it places her well to train broking staff, insurer's staff, human resource staff or even employees who are interested to understand more about what they are covered for by their employers.

Currently in the market, there are no specific courses offered by institutions on group plans such as Term Life, Dread Disease, Personal Accident, Hospitalization, Outpatient etc. Pat sees a need in this area thus she is offering such training. As Chief Operating Officer (COO) of Pan Resources, she was responsible in conducting in-house training for the staff.

Workshop Topics

- The benefits of Group Business
- How to persuade a prospect to appoint you
- How to handle objections
- How to structure a group plan for the various sizes of Companies
- Policy Administration to support the client's portfolio
- How to handle claims.

FEE: Representative Member - \$50.00 () FA Firm Member - \$70.00 () Non Member - \$100.00 ()

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When & Where

Date : 22/01/2016 (Friday)

**Time : 1000 - 1300 hrs
(0930 hrs Registration)**

**Venue : Aviva Ltd
6 Shenton Way
OUE Downtown 2
Level 7 @ Alexandra Room
Singapore 068809**

Closing Date: 15th January 2016

3 CPD Hrs for SKILL

Send & Mail Cheque Payable to:

**AFA(S)
AFA(S) Secretariat
1003 Bukit Merah Central
#04-23 INNO Centre
Singapore 159836
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Website: www.afas.org.sg**