

# HOW TO BUILD A GROUP BUSINESS IN EMPLOYEE INSURANCE BENEFITS

A 2 Day Workshop on “How to Build a Group Business in Employee Insurance Benefits”

Learn from a veteran Pat Toh previously the COO of Pan Resources, the largest home grown insurance broker specializing in employee benefits. Pat has 20 years of experience in this business. She will be sharing with you how to design the various templates, how to set in place the various processes and Standard Operation Procedures needed to start and carry on this business and how to have the winning edge over your competitors.

At the end of the 2 day workshop you will be fully equipped to go out and immediately start your group business or improve on your current portfolio.



## About the Workshop Speaker

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 benefit 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 how to build a group business. 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.

Some of the topics to be covered include the following:

- 1) How to design the master quotation templates for the different products with special enhancements
- 2) How to design the contents of the marketing kit to present to prospects
- 3) How to design the operations checklist for smooth operations of your clients account
- 4) How to help clients or prospects choose a broker/FA through Request for Proposal (RFP)
- 5) How to set up the various departments in the business model
- 6) How to handle insurers

**DATE:** 31/03/2016 & 01/04/2016  
**TIME:** 0900 to 1700 hrs  
**Venue:** AXA University Campus Assam Room  
 3 Lady Hill Road (S 179682)  
**CPD:** 12 hours

## REGISTRATION FORM (Please complete the registration form)

<b>FEE : \$1,000.00 (Lunch &amp; Handout will be provided)</b>				
<b>NAME</b>				
<b>DESIGNATION</b>				
<b>COMPANY</b>				
<b>ADDRESS</b>				
<b>CONTACT</b>	<b>OFFICE</b>		<b>MOBILE</b>	
<b>EMAIL</b>				
<b>PAYMENT:</b>	(    ) CASH	(    ) Cheque		
<b>Bank:</b>	_____		<b>No.</b>	_____

**Make Cheque Payment of \$1000.00 payable to AFAS(S)**  
 Please mail your Registration Form & Cheque to the below mailing address.

  
Association of Financial Advisers (Singapore)

**Association of financial advisers (Singapore)**

1003 Bukit Merah Central  
 #04-23 INNO Centre  
 Singapore 159836  
 Tel: 62738823  
 Email: secretariat@afas.org.sg  
 Website: www.afas.org.sg