

**MEMBER RESOURCES – BEST PRACTICES DIVISION 3
ACQUISITION OF YOUNG CLIENTS TASK FORCE SUMMARY**

OBJECTIVE:

Identify successful strategies for acquiring, advising and communicating with millennial clients.

CHAIR SUMMARY:

Welcome emails have been sent to the task force members and also a reminder to secure flight bookings for the meeting. Instructions to submit their ideas on successful ideas or strategy handling millennial client has been sent to the task force members. A WhatsApp group chat will be created to connect with the members.

GLOBAL COUNCIL MEMBER COMMENTS:

Interactions have begun in the group and a Whatsapp Group is underway too. The group seems to be a good young unit and I think their input and findings on working with millennial clients will be interesting.

OPPORTUNITIES TO CONSIDER

None at this time.

PARTICIPANTS

ExCom Liaison:	Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Rickson Joel Dsouza, Dubai, United Emirates
Chair:	Lucia Dewani Soeradji, Jakarta, Indonesia
Members:	Lim Chee Yen, B.Bus, RFC, Petaling Jaya, Malaysia
	Chen Gifford, CFP, Kwun Tong, Hong Kong
	Naomi Chua Yi-shyan, ChFC, Singapore, Singapore
	Ho Yeol Jeong, Seoul, Republic of Korea
	Hoon Joo, Seoul, Republic of Korea
	Naoki Masuda, Tokyo, Japan
	Miki Nagumo, Tokyo, Japan
	Delia Hui Wong, Singapore, Singapore
GCM Liaison:	Pamela Brown, CAE, CMP
Staff Liaison(s):	Pamela Brown, CAE, CMP and Liz DeCarlo

**MEMBER RESOURCES – BEST PRACTICES DIVISION 3
ADVANCE PLANNING TASK FORCE SUMMARY**

OBJECTIVE:

Identify repeatable processes to effectively communicate complex business strategies to clients.

CHAIR SUMMARY:

This is a multi-talented task force of committed members. I am in constant touch with them via social media and emails. All members are equally excited to be on this team. As the committee will not meet until February, only some preparatory tasks have been completed.

Welcome e-mails to the task force have been sent. Instructions to book flights for the meeting have been sent too.

The task force members have submitted their ideas on client strategy, marketing and practice management technique. This will be further shared with the task force during our February meeting. In the spirit of creating connection with the task force members, a WhatsApp groups has been created.

GLOBAL COUNCIL MEMBER COMMENTS:

As mentioned above by Manmohan, since the committee doesn't meet till February, there has been little to do just now other than exchange pleasantries. I feel like it is paving the way for more interactive communication as we get closer to the date. Manmohan has been very active in communicating with his task force.

CHALLENGES TO CONSIDER:

Since most of the task force members are insurance based, it will be interesting to get the international views on the application of products and planning for advance planning strategies.

OPPORTUNITIES TO CONSIDER

There will be loads of new ideas that our members could use from this very international task force.

PARTICIPANTS

ExCom Liaison:	Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Rickson Joel Dsouza, Dubai, United Arab Emirates
Chair:	Mohammad Manmohan Abdullah, ChFC, CLU, Kuala Lumpur, Malaysia
Members:	Mohammad Faizal Bin Assip, Kuala Lumpur, Malaysia
	Wen Du, Guangzhou, China
	Venkatesh Kalyanam, BA, CFP, Singapore, Singapore
	Lancia Liu, CFP, Taipei, Taiwan
	Toshinaga Okamoto, TLC, AFP, Tokyo, Japan
	Nobuhiro Otsuka, Tokyo, Japan
	Sukanta Singha Roy, CFC, FSS, Kolkata, India
	Cristine T. Tan, RFC, LUTCF, Quezon City, Philippines
GCM Liaison:	Pamela Brown, CAE, CMP
Staff Liaison(s):	Pamela Brown, CAE, CMP and Liz DeCarlo

**MEMBER RESOURCES – BEST PRACTICES DIVISION 3
RETIREMENT PLANNING TASK FORCE SUMMARY**

OBJECTIVE:

Identify successful approaches for advising clients on saving and investing for retirement.

CHAIR SUMMARY:

I really look forward to the Retirement Planning meeting that will be held in Singapore in February. Life insurance advisers from 10 Asian countries will participate in this meeting. I'm very lucky to have two experienced liaisons, Pamela and Liz, helping me sending out invitations to all members on August 19.

The mission of the Retirement Planning Task Force is to find out successful plans and concrete suggestions for retirement. Every member is from a different country, therefore, we should have market research on the financial tools available for retirement planning in each of our respective countries. We should share with each other our difficulties and challenges, effective measures, and suggestions for future retirement planning.

The focus of this meeting is on sharing our difficulties and problems with each other, and seeking best practice together. A WeChat group will be created so that it's more convenient for us to contact each other.

Once again, I want to thank the Executive Committee of MDRT for your trust, and for giving us the opportunity to learn from each other, draw from the past experience, and seek best practices. I believe this will help all of us to grow in our career and be successful. Thank you!

GLOBAL COUNCIL MEMBER COMMENTS:

The committee communication is underway and the team looks like it is ready to begin work. The diversity in the group should give us a significant understanding into retirement planning strategies successfully implemented across Asia.

CHALLENGES TO CONSIDER:

None at this time.

OPPORTUNITIES TO CONSIDER

None at this time.

PARTICIPANTS

ExCom Liaison:	Peggy Tsai, RFP, CCFP, Taipei, Taiwan
Global Council Member:	Rickson Joel Dsouza, Dubai, United Arab Emirates
Chair:	Bo Jiang, Shenzhen Guangdong, China
Members:	Carmenita A. De Rosas, RFC, Makati, Philippines
	Korawan Jinyunyamet, Bangkok, Thailand
	Cherian Panavila John, MBA, FAIQ (CII) Abu Dhabi, United Arab Emirates
	Chetan Joshi, CFP, Mumbai, India
	Kris Kuah Hwee Ling, ChFC, Singapore, Singapore
	Janette Lee, Manila Philippines
	Jiazheng Lin, Haikou, China
	Esra Manurung, Jakarta, Indonesia
	Juntima Narawongsanon, Bangkok, Thailand
	Jovin Su Phing Yeo, CFP, AEPP, Singapore, Singapore
GCM Liaison:	Pamela Brown, CAE, CMP
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