

SPEAKERS & PANELLISTS



Dr Khoo Kah Siang
President, Life Insurance Association (LIA)
Chief Executive Officer, Great Eastern Life Assurance Company Limited
IBF Distinguished Fellow

Dr Khoo Kah Siang is the Chief Executive Officer of Great Eastern Life Assurance Co. Ltd as well as Chairman of Great Eastern Financial Advisers. Dr Khoo has held various senior executive leadership positions during his 20-year career, including Head of Group Actuarial and Chief Financial Officer at Great Eastern as well as four years as Deputy Director in the Monetary Authority of Singapore .

His customer-centric approach has led Great Eastern to several prestigious industry accolades, including the Life Insurance Company of the Year Award twice by Asia Insurance Review and joint top life insurer in the 2014 Customer Satisfaction Index of Singapore.

As the current President of the Life Insurance Association of Singapore (LIA), Dr Khoo spearheads working groups and dialogues with key working partners to provide feedback on industry public initiatives, such as MediShield Life, compareFIRST, and the introduction of Direct Purchase Insurance products.

In his capacity as Co-Chair of LIA FAIR Task Force (2012-2014), Dr Khoo co-led discussions and initiated proposals from LIA on Financial Advisory Industry Review (FAIR) to ensure a better value proposition for customers, particularly in the areas of fee-based compensation and lowering of distribution costs.

A firm advocate of professionalism, he has generously contributed his time and expertise on numerous industry committees relating to taxation, accounting standards, actuarial science and risk management.

Dr Khoo is also currently a member of the Board of the Singapore College of Insurance.

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Mr Roland Yeo
President Elect, Insurance and Financial Practitioners Association of Singapore (IFPAS)
Senior Financial Services Director, Roland Yeo Organisation
A group of agency units of Prudential Assurance Company Singapore (Pte) Limited.
IBF Fellow

Mr Roland Yeo is an industry veteran with over 28 years of experience. He currently leads a successful team of financial planning professionals. Having enjoyed career success in helping clients make wise decisions in their business and personal financial planning, Roland is passionate about equipping his team holistically with the essential skill sets to do likewise.

On the macro front, Mr Yeo's vision and foresight of the finance landscape of Singapore has propelled his work in the Insurance and Financial Practitioner Association of Singapore (IFPAS) as a Vice President-2014 and now as President-Elect in 2015. As IFPAS Head of Education and Training, he formalized and launched the education roadmap for financial practitioners, encompassing academic technical knowledge as well as soft skills crucial for counseling work and financial education in 2013.

He is also a member of IFPAS STAR Alliance team. As a member of the IFPAS STAR Alliance, he is one of the seven members representing 15,000 financial practitioners engaging MAS on the FAIR issues and other specific issues concerning the financial practitioners, as well as the society at large through FinCARE®, which provides pro-bono financial counselling and financial literacy education.

Mr Yeo's spirit of excellence is the key driving force behind every works undertaken from agency, community and church to reach out to others. He is also the founder of FaithMissions, reaching out to the lesser in every way. He is a firm believer in continuous learning, himself being a Chartered Financial Consultant, Chartered Life Underwriter and Certified Specialist in Financial Education.

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Mr Joseph Kwok
President, Financial Planning Association of Singapore (FPAS)

Mr Joseph Kwok is currently an Independent Non-Executive Director and Audit Committee Chairman of 3 SGX main-board listed companies.

He has more than 16 years of experience in the financial services industry and was the Deputy General Manager of Professional Investment Advisory Services (PIAS) heading its product strategy department until Jan 2016. He had previously held senior roles with global financial institutions like JP Morgan (Executive Director); UBS AG (Director, Advisory Consultant, North Asia); Standard Chartered Bank Singapore (Deputy GM, Wealth Management).

Mr Kwok is also an adjunct lecturer with Kaplan teaching finance and business related subjects. He also provides corporate trainings to bankers from several Chinese banks like China Merchant Bank and Industrial Bank Of China.

Mr Kwok volunteers in non-profit organizations and is currently the President of Financial Planning Association of Singapore (FPAS) and an NTUC U-Associate Leader. In addition, he is Chairman of Singapore Gymnastics Audit Committee.

Mr Kwok graduated with a Master Of Commerce degree (majoring in advance finance) and a Bachelor of Commerce degree (majoring in Accounting and Finance) from University of New South Wales. He is a certified accountant with CPA Australia and a Certified Financial Planner (CFP).

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Mr Vincent Ee
President, Association of Financial Advisers (AFA) Singapore

Mr Vincent Ee has 27 years' experience in the financial services industry. During this time, he has grown from his early days as a financial planner to become the co-founder and CEO of Financial Alliance.

In the 14 years at the helm of Financial Alliance, he has grown the company into Singapore's leading and widely-respected Independent Financial Advisory firm by tirelessly championing independent financial advice to consumers and businesses.

As the President of the Association of Financial Advisers (AFA) Singapore, Mr Ee has successfully engaged various financial advisory industry stakeholders, including the Monetary Authority of Singapore, to elevate the standard and image of financial advisers. He will continue to push for greater cooperation and coordination among the stakeholders to pave the way for a brighter and more professional future for the industry.

SPEAKERS & PANELISTS



Dr Fong Wai Mun
Associate Professor, National University of Singapore (NUS)

Associate Professor Wai Mun Fong teaches a course in Personal Finance and Wealth Management at the Department of Finance at the National University of Singapore. He is the author of two textbooks on personal finance (Personal Financial Planning and Personal Investment, both by Pearson) and a research monograph on investment entitled *The Lottery Mindset: Investors, Gambling and the Stock Market*. Dr. Fong has extensive consulting experience with leading banks and financial institutions including Citibank, UOB, DBS, ANZ, and AIA. He is also on the Asia-Pacific Advisory Board of Brandes Institute in the U.S., the research unit of leading investment firm, Brandes Investment Partner. Dr Fong's research focuses on portfolio analytics, behavioral finance, market anomalies, and their implication for investors.

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Mr Damien Ng
Vice President, Head of Retail Distribution, BlackRock Singapore

Mr Damien Ng, Vice President, is the Head of the Singapore Retail Sales Team. He is responsible for developing and maintaining relationships with the firm's retail business clients out of Singapore, encompassing product lines including mutual funds and iShares ETFs.

Mr Ng has more than 10 years of experience in the financial industry. Prior to joining BlackRock in 2014, Mr Ng spent 7 years in Citibank with his most recent appointment as an Investment Consultant where he provided investment portfolio advice to Citibank's affluent clientele on mutual funds, structured products and fixed income. Mr Ng has also worked for two other banking institutions.

Mr Ng holds a Bachelor Degree in Business Management from Singapore Management University double majoring in Finance and Marketing. He is also a CAIA charter holder.

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Ms Ong Puay See
CEO, The Institute of Banking & Finance (IBF)

Ms Ong Puay See is the CEO of the Institute of Banking and Finance (IBF). She oversees IBF in its role as the national accreditation and certification agency for financial industry competency standards in Singapore.

Prior to her secondment to IBF, Ms Ong has had more than 15 years of experience with the Monetary Authority of Singapore (MAS). In her time with MAS, she has worked in the Financial Centre Development Department, where she was responsible for promoting Singapore's financial centre, as well as in overseeing MAS grants and incentive schemes, and driving initiatives to develop manpower for the industry. She has also contributed in the Market & Business Conduct Department, where she was responsible for developing national financial education programmes under the "MoneySENSE" initiative.

Before joining MAS, Ms Ong was with the Singapore Ministry of Finance from 1994 to 1998.

Ms Ong holds a Bachelor of Accountancy (Honours) Degree from the Nanyang Technological University, Singapore.

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Ms Rachie Hui
Deputy CEO, The Institute of Banking & Finance (IBF)

As Deputy CEO, Ms Rachie Hui provides policy advice to the CEO and supports the CEO in overseeing the strategic operations of IBF. She also plays a key role in fostering partnerships with the financial industry, financial training providers and Institutes of Higher Learning so as to advance IBF's mission of empowering practitioners with capabilities for a robust Asian financial industry.

Since joining IBF in 2004, she has been actively working with the industry under the leadership of the IBF Standards Committee to raise the professional competency of the financial services practitioners through standards development, accreditation and certification.

Ms Hui has over 25 years of experience in managing different types of training and education initiatives, including older worker training at National Productivity Board (now Productivity and Standards Board), vocational training at the Times Publishing Group, technical training at the Singapore College of Insurance as well as sales and advisory training at the AXA Life Insurance.

Ms Hui graduated from the University of Newcastle-upon-Tyne, UK in 1988. She holds a Master in Education (University of Manchester) and an Executive MBA (Rutgers Business, The State University of New Jersey). She has also completed the General Management Programme at Harvard Business School in 2012.