

# Outstanding Agent of the Year Award

This award will focus on the development of long term relationships with clients and insurers; commitment to promoting the work of the industry and the company as well as enhancing the industry image; and demonstration of professionalism and industry expertise; The award will also recognise service excellence with vivid sample of overcoming difficulties or outstanding performance for clients.

## Ms Duan Juzhen

China Life Insurance (Overseas) Company Limited



Ms. Duan Juzhen Jennifer joined China Life Insurance (Overseas) Company Limited Hong Kong Branch in 2005. In a career spanning 10 years, Jennifer has not only managed to build her agency family with nearly 500 agents in 5 years, but she has also been promoted 5 times in 6 years. She is now the Senior District Director of the company, holding the Certificate of Professional Patterns of Management.

Besides the achievement of developing a long-term relationship with the company and building a strong agency team, Jennifer's outstanding performance has won her not only the company's "Recruitment and Business Development" goals for 5 consecutive years, but also several industrial awards, including the IDA Dragon Award – Manager Category since 2013, and GAMA International Management Award since 2011. In addition, she has also won the following awards in 2015:

- > IDA Golden Dragon Award – Manager Category
- > IDA Bronze Dragon Award – Agent Category
- > GAMA Frontline Leader Award – Silver
- > GAMA International Management Award - Diamond
- > GAMA Leader Benchmark Award
- > LUAHK Distinguished Manager Award

"It's a great honor to be one of the finalists of the "Outstanding Agent of the Year" award. I would like to express my sincere gratitude to HKFI, China Life (Overseas) and my teammates. I will continue to strive for excellence in providing the best service to customers."



## Mr Joel Leung

Prudential Hong Kong Limited



Joel Leung, Principal Financial Planner, has been serving Prudential for 17 years. Prior to that, he was a government officer with different law enforcement for a decade. Being Honour Roll and TOT member of MDRT, he has demonstrated outstanding performance in all areas of his work.

To equip himself well, he has pursued Doctors of Laws & Finance as well as Chartered and Fellow membership in different aspects, for example Trust and Estate, Asset Management, Risk Analysis, Public Accountant, Secretaries & Administrators; and with professional bodies associated with the Institute of Directors & Financial Management.

To serve clients better, Joel has sharpened his skills through challenging contests and was awarded of the Financial Planner of the Year by HKIB, IFPHK, LUAHK & RFC and Distinguished Salesperson (DSA) and Distinguished Agent (DAA).

To serve the industry, Joel regularly accepts invitations as a platform speaker for industry events, e.g. MDRT Day in HK & PRC, Annual Meeting in US and other key organizations, e.g. Hebei CPPCC (河北省政協系統幹部) to promote the industry image.

In community services, he has been Arbitrator of China International Economic & Trading Arbitration Committee (CIETAC), Assessor in Royal Institute of Chartered Surveyors (RICS), Senior Town Planner & Researcher in China City Development Institute (CCDI), Vice Chairman of Certified Management Accountants (CMA), Independent Non-Executive Director (INED) of HK & Nasdaq Listed Company.

Through Joel's work, he promotes comprehensive planning services to high net worth clients, e.g. Keyman Insurance, Executive Bonus, the Financial Planning Centre concept and pilot scheme of Family Office. To share his experience, he wrote the book of "Corporate Governance" (管治).

To further obtain this award, Joel is believed the most qualified and competent celebrity in Prudential history.

Joel has been serving Prudential customers for 17 years and would like to take this opportunity to thank you all for your continuous support.



## Ms Red Wong

AIA International Limited



Red Wong has been with AIA for 26 years, advising and serving over 400 individuals and families. She believes that "The interests of clients always come first". Clients' satisfaction does not come only from the advice by a Financial Planner, but also from his/her services, implementation and regular reviews of the plans. She has been qualified as an MDRT member for 25 years, and at COT level for 3 times and achieved Quarter of Century MDRT membership in 2016.

Red knows that knowledge is the key to growth. She keeps better equipping herself with professional qualifications and has attained the following:

- > Fellow, Life Underwriter Training Course (LUTCF) in 2001,
- > Professional Diploma in Personal Financial Planning, HKUSPACE in 2003,
- > Fellow, Chartered Financial Planner, FChFP, in 2005,
- > Certified Financial Planner, CFP, in 2005,
- > Fellow, Life Management Institute, FLMI, in 2007

Red became an agency leader in her 4th year of career. She was appointed District Director in 2012. Among her team of over 40 Financial Planners, 30% is at MDRT membership level. With her leadership and supervision, she has been qualified for the General Agent and Manager Association, GAMA awards from 1995 to the present. Work life balance is her agency philosophy.

To give, besides taking, Red was a moderator of Life Underwriter Training Course, LUTC, from 1997 to 2003, a committee member of Life Underwriter Association, LUA, Annual Convention from 1993 to 1996 and the Local Chair and Zone Chair of MDRT International Members Communication Community (IMCC) from 1996 to 1999. In addition, over the years, Red has been invited to deliver speeches at various insurance companies to share her experiences, sweet and sour, and practical tips with other professionals in the industry.

