

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	<u>16th Jun 2026</u>	Department:	<u>ACB Sales</u>
Job title:	<u>ACB, Affluent Segment, Area Director</u>	BU/Division	<u>Bancassurance</u>
GCF level	<u>5</u>	Career track:	<u></u>

Job purpose

Please provide a summary of the purpose and objective of the job.

Lead the development and execution of Sun Life's Affluent and Emerging Wealth strategy within ACB. Drive sustainable growth by building affluent penetration, strengthening banker capability, developing client value propositions, and embedding insurance as a core component of ACB's wealth management ecosystem.

The role is accountable for delivering business growth, building affluent sales capability, and establishing scalable best practices that support the ambition of creating Vietnam's Best-in-Class Bancassurance Model.

Major accountabilities

Identify 5-6 major accountabilities of the job (not the employee). Describe these accountabilities by what is to be accomplished, how and why. Use action verbs to begin each sentence. Avoid the use of acronyms. Include the approximate percentage of time spent on each accountability. The percentages below should sum up to 100.

1. Drive Affluent Business Growth & Penetration Lead execution of AFF strategy across assigned regions and branches. Deliver AFYP, case count, penetration and productivity targets for affluent segment. Identify growth opportunities from Priority, Wealth and Emerging Affluent customer bases. Build and implement localized business plans to accelerate affluent customer acquisition and conversion. Monitor business performance and implement corrective actions to achieve growth objectives.	35%
2. Build Affluent Sales Capability Coach Privilege Relationship Managers (PRM), Priority Bankers and IOIS on affluent customer engagement. Develop consultative selling capabilities focused on wealth protection, legacy planning, retirement and succession planning. Ensure consistent execution of affluent sales process and customer journey. Identify capability gaps and recommend training interventions.	20%
3. Partner with ACB Wealth & Retail Banking Teams Establish strong partnerships with Regional Directors, Area Managers, Priority Banking Leaders and Branch Directors. Position Sun Life as a strategic contributor to ACB's wealth proposition. Support integration of insurance solutions into customer portfolio reviews and wealth conversations. Collaborate on joint business plans and strategic initiatives.	15%
4. Develop Client Value Proposition (CVP) Execution Execute affluent-focused campaigns, customer events, seminars and wealth engagement activities. Gather customer and banker insights to continuously improve CVP. Support rollout of new affluent propositions and wealth initiatives. Drive adoption of approved customer engagement models	10%
5. Sales Governance & Performance Management Monitor sales quality, compliance and customer outcomes. Ensure all sales activities align with regulatory and company requirements. Track key business metrics and proactively manage risks. Drive disciplined execution through robust activity management.	10%
6. Build Scalable Affluent Model & Best Practices Identify successful practices and replicate across regions. Support pilot initiatives and transformation programs related to affluent distribution. Provide market intelligence and competitor insights. Contribute to long-term bancassurance and wealth strategy development.	10%

Specialized knowledge and skills

List specific types of technical or professional skills and knowledge required for the job.

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Required

Strong understanding of Affluent / Wealth Banking business models.
 Knowledge of investment, protection, retirement and legacy planning solutions.
 Strategic business planning and execution capability.
 Stakeholder management across multiple seniority levels.
 Strong coaching and capability development skills.
 Data-driven performance management.
 Ability to leverage AI and digital tools to improve productivity, business insights and decision making.

Preferred

Experience working with Priority Banking, Wealth Management or Affluent Distribution.
 Experience in bancassurance partnership management.
 Exposure to HNW/UHNW customer segments.

Problem solving

Outline problem solving requirements in terms of how standardized, varied, complex and interdependent problems and issues are typically faced by this job. Provide examples if necessary.

Solve complex business challenges involving multiple stakeholders across Sun Life and ACB.
 Balance short-term sales delivery with long-term capability building.
 Identify structural bottlenecks impacting affluent penetration and recommend solutions.
 Navigate ambiguity and influence decisions without direct authority.

Education and experience

Indicate the minimum education level and years of relevant experience required to perform the work. Include specific professional designations, licenses, registrations, if applicable.

Bachelor's Degree in Banking, Finance, Economics, Business Administration or related disciplines.
 Minimum 7 years of experience in banking, insurance, wealth management or financial services.
 Minimum 3 years of leadership experience managing sales teams or business development functions.
 Demonstrated track record of delivering business growth in affluent or wealth segments.

Communication scope

Identify the level and nature of internal and external contacts with whom this job must interact regularly. Describe the reason and frequency of their communication.

Internal

CBO
 Head of Affluent Distribution
 Sales Heads
 Marketing
 Product
 Operations
 Compliance
 Training & Enablement

External

ACB Retail Banking Leadership
 ACB Priority Banking Team
 Regional Directors
 Branch Directors
 Relationship Managers
 Strategic Partners

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Management scope

Total number of direct reports: 10-15 IOIS (Affluent Specialists)

Total number of staff managed (direct and indirect): N/A

Metrics (if applicable)

Finance metrics (revenue, budget managed, etc.):

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):

Prepared by:		Date:	
Approved by:		Date:	
For HR Use Only			
Handled by:		Date:	
Job profile		Job category	
JAR #:			

This job description is attached as a part of the Labour Contract be executed in two sets. One set will be kept by the employer. One set will be kept by the employee and both sets have the same legal effect.

ACCEPTANCE AND CONFIRMATION

I also confirm that I have fully read, understood and agreed to the job description.

[full name]

Date signed