

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	05/08/2026	Department:	Bancassurance Operations & Services (BOS)
Job title:	Specialist, Bancassurance Operations and Services	BU/Division:	Bancassurance
GCF level:	N/A	Career track:	

Job purpose

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

The Contractor, Bancassurance Operations and Services provides logistics, administration and documentation support to ensure efficient execution of Bancassurance activities, strong governance compliance and timely support for business operations.

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.

Logistics & Operational Administration Coordinate logistics, meetings and operational administration to ensure timely and smooth execution of Bancassurance activities.	30%
Documentation & Governance Support Store accurate, complete and documentation, trackers and supporting records to ensure governance compliance.	30%
Business Support Provide timely coordination and administrative support to the Manager for business activities.	30%
Ensure all activities, decisions and deliverables comply with fair treatment of Clients principles, proactively identifying and mitigating risks of unfair client outcomes in line with Company conduct expectations.	10%

Specialized knowledge and skills

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

- Good knowledge of administration, logistics coordination, event support and document management.
- Strong attention to detail, organization and follow-up discipline to manage multiple tasks within agreed timelines.
- Good communication and stakeholder coordination skills in Vietnamese and English.
- Proficient in Microsoft Office applications, especially Excel, PowerPoint and Word.
- Demonstrate the Curiosity to effectively leverage AI tools to enhance productivity, decision-making, and quality of outcomes within the role

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.

- Resolve routine logistics, documentation and coordination issues by following agreed procedures and escalating exceptions in a timely manner.
- Identify documentation gaps and escalate issues promptly to maintain governance compliance and operational effectiveness
- Prioritize multiple operational requests while balancing urgency, accuracy, stakeholder expectations and compliance requirements.
- Demonstrate strong accountability in problem solving by proactively identifying, owning, and resolving all issues within scope, regardless of formal task assignment

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 business administration, Banking, Insurance, Economics or related disciplines.
- 1–3 years of experience in administration, operations support, logistics, event coordination or related functions.

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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.

- Regular coordination with bank partners, vendors and internal functions for logistics, event support and documentation follow-up.
- Close interaction with the Manager and Bancassurance Operations and Services team to update task status, consolidate information and complete assigned deliverables.
- Professional and service-oriented communication to support smooth execution and stakeholder experience.

Management scope

Total number of direct reports: N/A

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

Metrics (if applicable)

- Logistics & Administration: Complete assigned logistics and administrative tasks accurately and within agreed timelines.
- Documentation Quality: Maintain complete, accurate and audit-ready documentation, trackers and supporting records.
- Manager & Stakeholder Support: Provide timely, responsive and reliable coordination support for business activities.
- Governance & Compliance: Ensure assigned activities follow company policies, governance requirements and Fair Treatment of Clients principles.