

JOB DESCRIPTION (JD)

Sun Life Asia Job Evaluation Process

Date:	15/06/2026	Department:	Policyowner Services
Job title:	Senior Assistant, Premium Management	BU/Division:	Operation
GCF level	3.2	Career track:	Individual Contributor

Job purpose

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

Responsible for executing premium collection and reconciliation transactions accurately and timely, ensuring proper recording, matching, and reporting of premium inflow while supporting operational efficiency and compliance requirements.

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.

A – Daily premium processing & reconciliation	70%
<ul style="list-style-type: none"> • Process daily premium collection transactions, including e-invoice accurately and timely • Perform reconciliation between channels and system records • Resolve unmatched or pending transactions • Achieve KPIs (TAT, accuracy, productivity) 	
B – Process improvement & system support	15%
<ul style="list-style-type: none"> • Participate in UAT testing • Recommend process improvements • Support automation initiatives 	
C – Others	10%
<ul style="list-style-type: none"> • Perform QC checks when required • Prepare reports on premium status • Investigate discrepancies and coordinate resolution • Ensure compliance with client fairness principles. 	
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.	5%

Specialized knowledge and skills

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

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- Knowledge of insurance or financial transactions
- Understanding of payment channels and reconciliation
- Strong attention to detail
- Excel and reporting skills
- 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.

- Handle exceptions such as unmatched transactions
- Work under peak workload conditions
- 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 Finance, Accounting, Business Administration or related fields
- At least 1–2 years of experience in operations, finance, payment processing, or reconciliation functions
- Experience in insurance operations or premium collection processes is preferred
- Proficiency in Microsoft Excel and data handling (e.g., reconciliation, reporting, data validation)
- Ability to manage high-volume transactions within tight deadlines

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 coordination with Finance, IT, Operations
- External interaction with banks (if required)

Management scope

Total number of direct reports: 0

Total number of staff managed (direct and indirect): 0

Metrics (if applicable)

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

Sales metrics (type and amount):

Other metrics (specify):

Travel required (express as % of working time):