JOB DESCRIPTION (JD)
Sun Life Asia Job Evaluation Process

Date:	28th Apr 2026	**Manager name:**	Vu Tuan Anh
		Manager title and GCF level:	Chief Bancassurance Officer
Job title:	TPB, Sales Head, Affluent segment	**Department:**	TPB Sales
Job level:	GCF 6	**BU/Division:**	Sun Life Vietnam/ Bancassurance

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

Lead the end-to-end development and execution of the Affluent Bancassurance strategy with TPB, with the ambition to achieve Best-in-Class performance in Vietnam within 3 years (2026–2028).

This role is accountable to:

- Unlock the full bancassurance potential within the affluent segment
- Build and scale a sustainable, high-quality revenue engine
- Develop a compelling Client Value Proposition (CVP) tailored for affluent customers
- Ensure execution excellence across IOIS, Bank, and internal teams

The role requires strong leadership in strategy shaping, stakeholder alignment, and disciplined execution, working closely with Regional Office, Bank partners, and internal functions.

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. Strategy & Business Planning (Affluent Focus)

- Define and lead the 3-year Affluent Bancassurance strategy (2026–2028) to achieve Best-in-Class positioning in the market
- Identify and unlock key growth levers within the affluent segment (product, process, distribution, client journey)
- Co-develop with TPB a scalable Affluent Business Plan, aligned with bank priorities and SLV strategic direction
- Build a clear roadmap to unblock structural constraints (process, capability, CVP gaps, resource limitations)

2. Client Value Proposition (CVP) Development:
Lead the design and implementation of a differentiated Affluent CVP, covering:

- Wealth protection & legacy planning
- Client experience & advisory model
- Product bundling and personalization

Collaborate closely with Regional Office and Product teams to ensure CVP is:

- Competitive vs market benchmarks
- Compliant yet commercially effective.

- Continuously refine CVP based on customer insights, sales feedback, and performance data

3. Sales Execution & Performance Delivery

- Drive consistent and sustainable sales growth from the affluent segment - Increase penetration in affluent client base
- Ensure effective deployment of IOIS resources (quantity & quality) to serve affluent clients through Improve conversion and productivity
- Design and implement execution for selected branches (e.g., Affluent pilot / flagship branches)

4. Partnership Management

- Build strong working relationships with TPB Retail Banking & Affluent leadership
- Align on joint KPIs, business priorities, and execution model
- Act as a trusted strategic partner, not only a product provider

5. IOIS Capability & Resource Management

- Ensure IOIS team is fit-for-purpose to serve affluent segment:
- Right ticket sizing (coverage vs opportunity)
- Right capability (advisory, relationship management, financial planning)
- Drive training, coaching, and certification programs to elevate advisory quality

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

- Strong understanding of affluent client behavior & wealth management dynamics
- Deep knowledge of bancassurance business model
- Strategic thinking with strong execution discipline
- Ability to manage complex stakeholder ecosystem
- Strong commercial acumen and performance orientation

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, cross-functional, and interdependent issues:
- Process inefficiencies
- Misalignment between stakeholders
- Capability gaps in sales force
- Provide practical, scalable solutions to unlock growth

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

- Bachelor Degree, majoring in Banking, Business Administration, Marketing.…
- At least 7 years of senior management position in bancassurance, life insurance or banking businesses and 8-10 years of experience or an equivalent combination of education and experience.

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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.

Internal:
- Senior leadership (SLV & Regional Office)
- Cross-functional teams

External:
- TPB senior stakeholders (Retail Banking, Affluent, Banca)
- Requires strong ability to influence, align and drive decisions at senior level

Management scope

Total number of direct reports: N/A

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):