



SOA China Annual Symposium

29–30 June, 2017
Shanghai, China



Welcome

On behalf of the Society of Actuaries (SOA), welcome to the 2017 SOA China Annual Symposium, our signature event in China.

This symposium features many timely insurance topics specific to China, from general insurance and investments to health care, pensions and life insurance. Through this event you'll learn new approaches and practices, expanding upon your knowledge base, such as on block chain and data analytics. I encourage you to meet with other attendees to share ideas and gain different perspectives.

Also, I want to extend my thanks to all of the participating organizations and speakers, including the general session speakers covering China's regulatory matters. I look forward to hearing about your experiences from this event.

Sincerely,

Mike Lombardi, FSA, CERA, FCIA, MAAA
SOA President-Elect



Agenda

THURSDAY, 29 JUNE 2017		LOCATION
08:00–09:00	Registration and Welcome Break	Junior Ballroom Foyer
09:00–09:10	Welcome Remarks Moderator: Shu-Yen Liu, FSA, CERA, MAAA Practice Leading Partner, PwC Presenter: Mike Lombardi, FSA, CERA, FCIA, MAAA President-Elect, SOA	Junior Ballroom
09:10–10:10	Keynote Speech 1: Exchange Rate, Regulation of Real Estate and Economic Fundamentals in China Moderator: Shu-Yen Liu, FSA, CERA, MAAA Practice Leading Partner, PwC Presenter: Songcheng Sheng Former Head of Statistics and Survey Department, The People's Bank of China Description: This session will discuss the stages of China's economic development and the expansion of insurance, including: 1) The comparison of Chinese and foreign macro data; 2) The development process of China insurance in recent years and the reasons for reform; 3) The future of insurance; 4) Medical treatment and pension, the advantages and challenges; and 5) The national conditions and consumption preferences, as well as ways to attract the public, with reference to overseas models and how to further enrich the medical care community and products.	Junior Ballroom
10:10–10:40	Coffee Break	Junior Ballroom Foyer
10:40–11:40	Keynote Speech 2: C-ROSS Phase II Moderator: Shu-Yen Liu, FSA, CERA, MAAA Practice Leading Partner, PwC Presenter: Yulong Zhao, HFIA, Ph.D. Director General of Finance and Accounting Solvency Regulation Department, China Insurance Regulatory Commission Description: In 2016, the China Risk Oriented Solvency System (C-ROSS) was officially implemented. This marked the completion of the main construction of the second generation of China's solvency system. One year later, C-ROSS phase II was launched. Priorities of phase II cover three main areas: 1. To fill the void in the system and to update the existing standards. This includes thorough review and calibration towards risk factors of both assets and liabilities, such as insurance, AMC and pension in IRR and more. 2. To reinforce the execution mechanism. There are a series of measures needed, such as data quality and authenticity inspection, as well as information system construction, to ensure a solid foundation for successful execution of the solvency regulation. 3. To strengthen prudential supervision cooperation, as well as to complete a trans-border, cross-product, cross-market, cross-industry supervision coordination mechanism. Overall, solvency regulation tends to further intensify, and insurers are encouraged to strengthen their risk management and capital budgeting capabilities in order to benefit in the long run.	Junior Ballroom

THURSDAY, 29 JUNE 2017		LOCATION	
11:40–12:30	Session 1: China Economic Liquidity and Regulation Moderator: Shu-Yen Liu, FSA, CERA, MAAA Practice Leading Partner, PwC Presenter: Huiyong Li Managing Director and Chief Macro Analyst, Shenyin Wanguo Futures Co., Ltd. Description: The presenter will share his opinion on the major and minor cycle of the global and China economies. He believes that the recovery of the major cycle depends on the resonance of politics between China and the United States, as well as reform. As the minor cycle is V-type, the weak recovery depends on policy and price increase. The liquidity regulation and the growth advance together. The economic cycle is stabilizing, monetary policy is tightening the margin and the importance of the regulation is increasing. The increase of the economy is critical to risk controlling.		Junior Ballroom
12:30–13:30	Lunch		Shanghai City Bistro Level 3
	JUNIOR BALLROOM		MEETING ROOM 1 & 2
	CONCURRENT (A) INVESTMENT & ALM		CONCURRENT (B) IFRS MANAGEMENT
13:30–14:15	Session 2	Improving the Regulatory System of Insurance Asset-Liability Management Moderator: Ling Guan FSA, FCAA Senior Executive, Funde Insurance Holding Co. LTD Presenter: Lin Du, PhD Deputy Director, Fund Regulatory Supervisory Division of Insurance Fund Management Regulatory Department, China Insurance Regulatory Commission Description: The presenter will analyze the necessity and urgency of improving the supervision system of insurance asset-liability management under China's insurance market environment. This session will introduce the supervision system, including the progress, basic framework, main content and the arrangements for the next stage. The general idea of the supervision system is to distinguish property and casualty and life insurance companies, then respectively define the rules of qualitative and quantitative assessment under the guidance of <i>Measures for the Supervision of Insurance Asset Liability Management</i> . It has a comprehensive assessment on the asset-liability matching and management of insurance companies from dimensions including long-term economic value, mid-term profitability, short-term liquidity and the bottom line of solvency. Based on the assessment result, it applies differentiated supervision to establish a mechanism that coordinates regulations on products, fund applications and solvency.	The Influence of IFRS 17 and 9 on Life Insurers Moderator: Zhikang Yan, FSA, FCAA Chief Operating Officer, Deputy Chief Actuary, Taiping Life Presenter: Xiaobin Yuan, FSA Partner, PwC Description: In this session, the presenter will make a brief introduction to IFRS 17, as well as discuss the potential impact of IFRS 17 to the financial statements and operations of insurers. He will also cover the interaction between IFRS 9 and IFRS 17. This session will present the fundamental changes introduced by IFRS 17 in areas such as measurement models, as well as discuss how results could be effected due to the complexity of the transition. It is very important for the insurers to understand the implications of IFRS 17 on their financial statements, operations and even their strategy, in order to better prepare and make the transition efficient in an effective way. This could be a challenge to all insurers, but is also a good opportunity to improve the capability of financial management and operations.

THURSDAY, 29 JUNE 2017		LOCATION	
		JUNIOR BALLROOM	MEETING ROOM 1 & 2
		CONCURRENT (A) INVESTMENT & ALM	CONCURRENT (B) IFRS MANAGEMENT
14:15–15:00	Session 3	<p>Survival in the Risk World: Finding the Right Balance Between Assets and Liabilities of a Life Insurer</p> <p>Moderator: Ling Guan FSA, FCAA Senior Executive, Funde Insurance Holding Co. LTD</p> <p>Presenter: Xiaodong Yu, FSA, FCAA, FLMI, CIA General Manager of Risk Management Department and CRO of Insurance Group, Fosun Group</p> <p>Description:</p> <ol style="list-style-type: none"> Risk is everywhere <ul style="list-style-type: none"> The risk map of a life insurer under C-ROSS Risk events that occurred previously that led to the insolvency of life insurance companies Proactively managing risks <ul style="list-style-type: none"> The beginning and end of the ALM process Risk appetite and solvency constraints for an effective ALM Proactive asset liability management under China's current regulatory and market environment Holding the bottom line <ul style="list-style-type: none"> EIOPA's Insurance Stress Test in 2015 and 2016 Some enlightenment for Chinese life insurers 	<p>IFRS 17 Management and Conversion</p> <p>Moderator: Zhikang Yan, FSA, FCAA Chief Operating Officer, Deputy Chief Actuary, Taiping Life</p> <p>Presenter: Jackson Chen, FSA General Manager of Actuarial Department, CPIC Allianz Health Insurance</p> <p>Description:</p> <ol style="list-style-type: none"> Proceeding and Summary <ul style="list-style-type: none"> Highlight IFRS 17 proceeding and content summary Key Implementation Issue <ul style="list-style-type: none"> Discuss key technical issues of IFRS, interaction with IFRS 9, operating issues, and more. Implementation and Conversion Solution <ul style="list-style-type: none"> Illustrate IFRS 17 implementation and solutions, including the time table, human resource input, actuarial modeling optimization, system and process improvement and more. <p>Presenters will also introduce the CPIC group implementation framework for IFRS.</p>

THURSDAY, 29 JUNE 2017			LOCATION
15:00–15:30	Coffee break		Junior Ballroom Foyer
	JUNIOR BALLROOM	MEETING ROOM 1 & 2	
	CONCURRENT (C) PRODUCT DEVELOPMENT	CONCURRENT (D) IMPLICATION OF NEW TECHNIQUES TO ACTUARIAL PRACTICE	
15:30–16:15	Session 4	<p>Functional Disability Insurance: New Perspective in Mature and Emerging Markets</p> <p>Moderator: Xu Zeng, FSA, FCAA Chief Actuary, CCB Life</p> <p>Presenter: Chua Tuan Miang, FIAA Regional General Manager, Gen Re Life/Health Asia</p> <p>Flora Shao, FIA, FCAA Chief Pricing Actuary, Gen Re Life/Health China</p> <p>Description: Disability insurance is a valuable product for consumers as it provides protection against the loss of income. Although the success varied in terms of both market penetration and profitability, it has become a dominant biometric risk product in markets such as Australia and Germany. Presenters will look at the success of disability insurance, innovative product designs in those high penetration, but strong competitive markets and look for product characteristics which could increase penetration in Asia, and especially China.</p>	<p>The Block Chain Brings in Brand New Opportunities</p> <p>Moderator: Sharon Huang, FSA, FCAA, FLMI Director and Consulting Actuary, Milliman</p> <p>Presenter: Wenli Su Assistant President, Sunshine Insurance Group</p> <p>Description: General Introduction of Block Chain</p> <ul style="list-style-type: none"> This session will introduce the definition, history and current status of block chain, as well as the necessities of its development. <p>Incorporating Block Chain into the Insurance Industry</p> <ul style="list-style-type: none"> Presenters will illustrate the significant roles, unique features and future prospects of block chain's application in an insurance company's operation. <p>Actuarial Application in Block Chain Development</p> <ul style="list-style-type: none"> Experts will demonstrate what roles actuaries play and how actuarial techniques can be optimized in block chain development. <p>The Achievements of Block Chain's Application in Sunshine Insurance Group</p> <ul style="list-style-type: none"> This session will discuss the implementation process, as well as the remarkable achievements of block chain's application in Sunshine Insurance Group.
16:15–17:00	Session 5	<p>Discussions on Channel Conflict in Product Development</p> <p>Moderator: Xu Zeng, FSA, FCAA Chief Actuary, CCB Life</p> <p>Presenter: Henry Hu, FSA, FCAA Chief Actuary, Aviva-Cofco Life</p> <p>Description: In recent years, the domestic insurance brokerage channel has witnessed significant breakthroughs. As a company with a multi-channel development strategy, Aviva-Cofco Life faces the challenge of channel conflicts in the rapid growth of both individual and brokerage channels. The presenter will share Aviva-Cofco's experiences, lessons learned, gains and losses in product development in response to channel conflict, as well as introduce some of the practices of foreign markets for reference.</p>	<p>Examples of Health Data Application in Online Insurance</p> <p>Moderator: Sharon Huang, FSA, FCAA, FLMI Director and Consulting Actuary, Milliman</p> <p>Presenter: Hai Bi, FSA CEO, Haola Tech</p> <p>Description: Due to the development of mobile internet, Chinese insurers now have a variety of valuable ways to collect and use customers' health data.</p> <p>The speaker will share his experience in health data application in the following fields:</p> <ol style="list-style-type: none"> Using data to customize health information and suggestion for customers; Using data to stimulate customers' needs for insurance products; and Using data to provide tailor-made products and services.
17:00–18:30	Reception		Junior Ballroom Foyer

FRIDAY, 30 JUNE, 2017		LOCATION
08:30–09:00	Registration and Welcome Break	Junior Ballroom Foyer
09:00–10:00	<p>Session 6: Chinese Actuary Career Sharing</p> <p>Moderator: Xiaojun Wang Deputy Dean of School of Statistics, Head of Risk Management and Actuarial Research Department, Renmin University of China</p> <p>Presenter: Jason Yao, FSA Executive Director, Group Executive Vice President, Chief Finance Officer, Chief Actuary Ping An Group</p> <p>Description: Although the actuarial profession in China began around 30 years ago, it developed at a very fast pace compared to the rest of the world. Actuaries have expanded their skillsets from insurance to the larger financial and social fields. By measuring and managing risk, actuaries bring financial security to individuals, corporations and the public. As a result, actuaries receive recognition and respect. The presenter will share his perspective on the actuarial career based upon his abundant work experience.</p>	Junior Ballroom
10:00–11:00	<p>Session 7: North American Actuary Career Sharing</p> <p>Moderator: Xiaojun Wang Deputy Dean of School of Statistics, Head of Risk Management and Actuarial Research Department, Renmin University of China</p> <p>Presenter: Mike Lombardi, FSA, CERA, FCIA, MAAA President-Elect, Society of Actuaries</p> <p>Description: The presenter will discuss North American actuarial careers. He will provide an overview on actuaries in the United States and Canada, including his personal experiences. He will also discuss supply and demand of actuaries in North America.</p>	Junior Ballroom
11:00–11:30	Coffee break	Junior Ballroom Foyer

FRIDAY, 30 JUNE, 2017		LOCATION
11:30–12:20	<p>Panel Discussion: How to Manage the Company: Should Actuaries be the CEOs?</p> <p>Moderator: Shu-yen Liu, FSA, CERA, MAAA Practice Leading Partner, PwC</p> <p>Presenters: Xiujuan Chen, FCAA Chief Actuary, CPIC Life</p> <p>Qu Liu, FSA, FCAA Assistant President and Chief Actuary, Taikang Group</p> <p>Jason Ma, FSA, MAAA President & CEO TransGlobe Life Insurance Company, Taiwan</p> <p>Lingling Wang, FSA, CERA, MAAA Deputy Chief Actuary, Ping An Group</p> <p>Dave Dowrich, FSA, ACIA, MAAA Chief Finance Officer, AIG APAC</p> <p>Description: Actuaries' work delivers value. Corporations depend on actuaries to make sound decisions for the future. Now actuaries are not merely limited to roles in risk management, but also in company management. This session will discuss how actuaries can integrate their unique quantitative thinking into a company's strategy development and overall management.</p>	Junior Ballroom
12:20–12:30	<p>Closing Remarks</p> <p>Presenter: Ann Henstrand Senior Director of Asia & Latin America, Society of Actuaries</p>	Junior Ballroom

2017 SOA 中国年会 日程

2017年6月29号, 星期四	
8:00-9:00	签到和入场
	主持人: 刘淑艳,FSA,CREA,MAAA 普华永道亚洲保险并购及精算咨询服务合伙人
9:00-9:10	开幕
	Mike Lombardi, FSA, CERA, FCIA, MAAA SOA当选主席
9:10-10:10	主题演讲1: 中国的汇率、房地产调控与经济基本面 主讲人: 盛松成 前中国人民银行调查统计司司长 中国经济发展阶段与保险业的拓展 1) 中外宏观数据对比 2) 中国保险近年来的发展过程以及改革原因 3) 什么是保险的未来 4) “医养结合”的优势及所面临的现实困境 5) 结论及建议: 结合中国国情\消费偏好\利好吸引大众, 参照海外模式, 进一步开放医养养老社区及产品
10:10-10:40	茶歇
10:40-11:40	主题演讲2: 偿二代第二阶段 主讲人: 赵宇龙,PhD,HFIA 保监会财务会计部(偿付能力监管部)主任 中国风险导向的偿付能力体系(“偿二代”)建设于2012年启动。2015年2月发布17项监管规则, 完成了主体制度体系建设。经过一年的过渡试运行, 2016年起正式实施偿二代。在全行业的共同努力下, 偿二代建设和实施取得了阶段性胜利, 行业对风险的识别和管理能力显著增强, 行业风险整体可控。偿二代二期工程于2017年正式启动, 按照“查漏补缺, 补齐短板”的要求, 不断完善我国偿付能力监管制度体系。 偿二代二期工程包括三个方面的重点工作: 一是填补制度空白、修订现行规则, 例如校准和完善风险因子, 扩大偿二代风险综合评级的范围, 将保险集团, 养老险公司、保险资产管理公司等纳入评价范围等。二是强化执行机制, 加强数据质量和真实性检查, 推进偿二代信息系统建设, 为偿付能力监管的顺利执行打好坚实基础。三是加强审慎监管协调, 对内加强与人民银行, 银监会和证监会的监管协调, 对外加强国际间监管合作, 切实防控好跨市场、跨行业、跨区域、跨产品的各类交叉性金融风险。 偿二代二期工程的启动和全面推进, 将进一步提升偿二代制度的科学性和监管指标对风险的敏感性。在当前复杂多变的资本市场环境下, 保险公司更要积极主动提高自身风险管理和资本管理能力, 实现长期健康可持续发展。

2017年6月29号，星期四			
11:40-12:30	专题演讲（1）：中国经济流动性和监管 主讲人：李慧勇 申银万国证券研究所董事总经理、首席宏观分析师 在总体缺乏新的增长点的背景下，我们维持对全球经济和中国经济L型、主要矛盾是通货紧缩的判断。值得指出的是L型底部并不是平坦的，而是由若干的V型构成，在小的上升期伴随着物价上涨会带来通胀预期。从大周期看，2020年之前中美有望形成大的政治周期共振。未来四年最重要的事情是中国的改革和美国特朗普新政。 从小的周期看，中国经济正处于供给侧复苏的中后期。PPI2月份见顶回落之后其滞后效应将存续2个季度左右，4季度和明年中国将再次面临再通缩的压力。 流动性监管和增长的交谊舞，经济周期性企稳期，货币政策边际收紧，监管重要性提升。但增长仍然是防风险的重中之重。		
12:30-13:30	午餐		
		投资/资产管理分会场	IFRS财务管理
		主持人：关凌，FSA,FCAA 富德保险拟任副总经理，财务总监	主持人：严智康，FSA,FCAA 太平人寿运营总监兼副总精算师
13:30-14:15	专题演讲（2）	加强保险资产负债管理监管制度建设 主讲人：杜林 中国保险监督管理委员会，保险资金运用监管部，资金监管处，副处长 分析在中国保险市场环境下，加强保险资产负债管理监管的必要性和紧迫性，重点介绍监管制度建设推进情况、基本框架、主要内容以及下一步工作安排。监管制度的总体思路是以《保险资产负债管理监管办法》为总纲，区分财产险公司和人身险公司，分别制定定性评估规则和量化评估规则，从长期经济价值、中期盈利能力、短期流动性和偿付能力底线等维度，综合评估保险公司资产负债匹配状况和管理能力，依据评估结果实施差异化监管，建立产品监管、资金运用监管和偿付能力监管协调联动的长效机制。	IFRS 17 和 IFRS 9对寿险公司的影响 主讲人：袁晓斌 普华永道精算咨询服务合伙人 介绍保险合同会计准则IFRS17的最新进展，重点分析IFRS17的实施对公司财务及运营方面的重大影响，以及IFRS17与金融工具准则IFRS9的互动选择。IFRS17繁杂复杂，在负债计量和利润确认上与现行的会计准则存在着根本性不同。因此，深刻地洞察IFRS17对公司各方面的深远影响至关重要，而如何合理地调度资源、实现准则顺利过渡，并抓住机会从业务和财务表现方面进行优化，同时有效地管理市场预期和控制实施成本将成为保险公司迫切需要面对的重要问题。
14:15-15:00	专题演讲（3）	在风险世界中生存——寻求寿险公司资产负债管理的平衡 主讲人：于晓东,FSA,FCAA,FLMI,CIA 复星集团风险管理部总经理兼保险集团首席风险官 1. 风险无处不在 · 偿二代下寿险公司的风险地图 · 寿险公司曾经发生过的风险事件 2. 主动管理风险 · 资产负债管理的始与终 · 风险偏好与偿付能力约束 · 中国当前监管和市场环境下主动的资产负债管理 3. 守住底线 · 欧盟保险业压力测试 · 对中国寿险公司的几点启示	国际会计准则保险合同的实施应对 主讲人：陈福生,FSA 太保安联健康保险股份有限公司精算部总经理 1. 准则进展及概要 · 回顾准则制定进展及准则概要 2. 实施关键要素 · 介绍IFRS 17的实施关键技术、与9的互动分析、对经营的影响等内容 3. 实施准备及应对方案 · 介绍IFRS 17的实施方案，包括时间表、人力投入、系统及流程改造、精算模型优化等，以及太保集团的整体实施框架

2017年6月29号, 星期四			
15:00-15:30	茶歇		
		产品开发	新技术在精算领域的应用
		主持人: 曾旭,FSA,FCAA 建信人寿总精算师	主持人: 黄雪昀,FSA,FCAA,FLMI 明德丰怡精算咨询精算咨询总监
15:30-16:15	专题演讲 (4)	功能性失能收入保险 – 成熟市场和发展中市场的新视角 主讲人: 蔡端绵,FIAA 通用再保险公司亚洲区寿险健康险总经理 邵红,FIA, FCAA 通用再保险公司上海分公司寿险健康险首席定价精算师 通过对潜在的收入损失提供保障, 失能收入保险满足了身为家庭支柱的被保险人最主要的保障需求。尽管其渗透率和盈利能力在各个保险市场千差万别, 但失能收入保险在澳大利亚和德国等市场已经成为最重要的风险保障型产品。在本次演讲中, 我们将分析失能收入保险的成功因素, 特别着重于其高渗透且激烈竞争保险市场中的创新产品设计, 共同探讨在亚洲尤其是中国市场可以提高失能产品认知度和渗透率的产品特征。	区块链带来崭新机会 主讲人: 苏文力 阳光集团总裁助理 1. 区块链的简介 介绍区块链的定义、发展历史和现状、以及发展区块链的必要性 2. 区块链与保险业相结合 介绍区块链在保险公司运营中的重要作用和独特优势, 以及未来区块链在保险业发展的应用方向 3. 精算技术在区块链发展中的作用 介绍精算师在区块链发展中扮演的角色, 以及如何将精算技术和区块链技术有效结合 4. 区块链在阳光集团的应用成果 介绍区块链在阳光集团的落地实施过程以及部分重要成就
16:15-17:00	专题演讲 (5)	产品开发中的渠道冲突问题探讨 主讲人: 胡敏,FSA,FCAA 中英人寿总精算师 近几年国内个险经纪代理市场实现了突破性的增长, 中英作为一个坚持多元渠道发展的公司, 在个险和经代渠道同时快速发展的同时也面临着渠道冲突的现实问题。我们将在此分享我们在产品开发中应对渠道冲突的经验、教训、得失, 并介绍国外成熟市场的一些做法供参考。	健康数据在互联网保险中的应用案例 主讲人: 毕海,FSA 好啦科技首席执行官 随着移动互联网的发展, 中国保险公司在采集和应用客户健康数据上进行了很多有价值的尝试。演讲者将在以下几个领域分享他的经验: 1、基于数据, 为客户提供个性化的健康资讯和建议; 2、用数据激发客户保险需求; 3、基于数据为客户提供精准健康保险和服务
17:00-18:30	招待酒会		

2017年6月30号，星期五	
8:30-9:00	签到和入场
	主持人：王晓军， 中国人民大学统计学院副院长，风险管理与精算中心主任
9:00-10:00	专题演讲（6）：中国精算师的职业发展 主讲人：姚波,FSA 中国平安保险(集团)执行董事、常务副总经理、首席财务官、总精算师 精算行业在中国已经发展了30年，取得了举世瞩目的发展速度。精算师逐渐将技能从保险领域扩大到更大的金融市场和社会领域。精算师为个人，企业和公众量化管理风险。长久以来，精算师这一职业获得社会的认可和尊重。姚先生将从自身的经验出发，以精算师的视角结合他丰富的工作经验，分享他对中国精算师职业发展的看法。
10:00-11:00	专题演讲（7）：北美精算师的职业发展 主讲人：Mike Lombardi, FSA, CERA, FCIA, MAAA SOA当选主席 Lombardi 将会讨论北美精算行业的发展。他将结合自身的经验，对美国 and 加拿大的精算师的职业发展进行概述，也会讨论北美地区精算师的供求状况。
11:00-11:30	茶歇
11:30-12:20	专题讨论：假如精算师成为CEO，将以何种模式运营公司？ 主持人：刘淑艳,FSA,CERA,MAAA 普华永道精算及保险并购业务合伙人 嘉宾： 陈秀娟，FCAA 太平洋人寿总精算师 刘渠，FSA,FCAA 泰康保险集团助理总裁、总精算师，泰康人寿助理总裁、总精算师 王玲玲，FSA,CERA,MAAA 平安集团副总精算师 Dave Dowrich, FSA,ACIA,MAAA AIG亚太首席财务官 马君硕,FSA,MAAA 台湾全球人寿总经理 精算师为社会、企业和个人创造价值。企业依靠精算师对未来做出正确的决策。精算职业发展到现在，精算师不仅将其专业技能应用在风险管理上，还广泛参与了公司的运营管理。此次专题讨论我们有幸请到了多位在保险公司的精算师高管，他们将带我们了解精算师如何将其独特的量化思维方式融入到公司的关键战略制定和整体管理中。
12:20-12:30	闭幕
	Ann Henstrand(韩安美) SOA亚洲和拉丁美洲高级总监



Keynote Speakers

Mike Lombardi, FSA, CERA, FCIA, MAAA

President-Elect

Society of Actuaries

Mike Lombardi, FSA, CERA, FCIA, MAAA, is president of MLBC, an actuarial consulting firm providing insurance companies with advice on business strategy, mergers and acquisitions, reinsurance and corporate actuarial challenges. Lombardi has served as senior vice president and chief actuary at Prudential Assurance Company, managing principal of the Willis Towers Watson (Tillinghast) Canadian Life and Property Casualty insurance consulting practice and executive vice president at RGA.

Lombardi is president-elect of the Society of Actuaries (SOA) and will take office as president in October 2017. He previously served as an SOA vice-president, working with the SOA Board of Directors. Lombardi is a former president of the Canadian Institute of Actuaries (CIA), and past chair of the CIA International Relations Committee.

Songcheng Sheng

Former Head of Statistics and Survey Department

The People's Bank of China

Songcheng Sheng is a professor, assistant and doctoral supervisor. He was granted a special allowance from the State Council. He is now councilor of The People's Bank of China (leading roles of departments or equivalents), director of the Statistical Analysis Professional Committee at the National Internet Finance Association of China, professor at the China Europe International Business School, as well as a former director of the Department of Investigation and Statistics of the People's Bank of China. For many years, he has successively published more than 100 professional articles in leading journals, such as *Social Sciences in China*, *Economic Research Journal*, *Journal of Financial Research*, and *China Finance*. Sheng has also published a number of other writings. In recent years, he proposed the theory of advancing the reform of interest and exchange rates, as well as the opening of a capital account. He has also made contributions to researching, compiling and promoting the index of social funding limitation.

Yulong Zhao, HFIA, Ph.D.

Director General

Finance & Accounting / Solvency Regulation Department
China Insurance Regulatory Commission

Yulong Zhao is the director general of the finance, accounting and solvency regulation department of the China Insurance Regulatory Commission (CIRC). He has more than 17 years of experience in insurance regulation and supervision and is mainly responsible for the solvency, accounting, capital instrument and taxation issues of the insurance industry. He is not only the key personnel of the first generation of China's solvency regime over the last decade, but is also the leading architect of the second generation of China's solvency system (C-ROSS).

Zhao was a qualified bridge designer before he received his Ph.D. in accounting from Shanghai University of Finance and Economics. He also holds an EMBA degree from China Europe International Business School (CEIBS). He is the first honorable fellow of the Institute and Faculty of Actuaries (IFoA) from mainland China and also one of the founding members of the China Association of Actuaries. Zhao is a member of China Financial Accounting Standard Consulting Board of the Ministry of Finance, the Chinese Institute of Certified Public Accountants and the Chinese Taxation Institute.

Zhao is also an adjunct professor of Peking University and several well-known universities in China. He serves as an anonymous referee for two top academic journals in China.

Session Speakers

Hai Bi, FSA

CEO

Haola Tech

Hai Bi, FSA, is chief executive officer of Haola Tech. He is a health insurance actuary with over 18 years of experience in health insurance. Haola Tech is an AI company providing individuals with customized health information and suggestions. Haola's customers include 22 insurance companies and four hospitals.

Jackson Chen, FSA

General Manager of Actuarial Department

CPIC Allianz Health Insurance

Jackson Chen, FSA, is responsible for the actuarial department at CPIC Allianz Health Insurance. He oversees the product development, actuarial evaluation and reinsurance functions, including product design and pricing, reserve valuation, experience analysis, capital management, reinsurance management and more. Chen was previously responsible for model management in the actuarial department at CPIC. As PMO, he successfully led the CPIC Prophet Conversion Project and established the Prophet actuarial platform. He worked on the solution design and model implementation for complex actuarial work, such as reserve movement, source of earning analysis, C-ROSS EV, EV movement and more.

Before joining CPIC, Chen worked at Sino-US United MetLife Insurance. He led the corporate actuarial team to perform corporate financial analysis (e.g. business planning, projection, EV and experience analysis). He has extensive experience in product development and agency compensation. Prior to this, he served as a counselor in Fudan University to provide guidelines for students' campus lives.

Xiujuan Chen, FCAA, EMBA

Chief Actuary

China Pacific Life

Xiujuan Chen, FCAA, EMBA, is the chief actuary of China Pacific Life Insurance Company. She graduated from Hunan Finance and Economics College with a bachelor's degree in actuarial science, Fudan University with a master's degree in business management and China Europe International Business School with an EMBA. Chen is a Fellow of China Association of Actuaries and serves as the executive director of the association. She has comprehensive actuarial theory knowledge, as well as extensive practical experience in pricing and valuation as a result of over 20 years of actuarial experience in life insurance industry. Chen joined China Pacific Life Insurance Company in 1995 and subsequently served as the deputy general manager, general manager of the actuarial department and chief actuary of the company. She has obtained excellent experience in leadership and management.

Dave Dowrich, FSA, ACIA, MAAA

Chief Finance Officer

AIG Asia-Pacific

Dave Dowrich, FSA, ACIA, MAAA, serves as corporate officer and chief financial officer of AIG Asia-Pacific. He is responsible for financial management of the AIG businesses in the region. In addition, he is responsible for controllership, tax, actuarial, capital management and finance transformation functions in the region. Dowrich serves on the boards of several AIG companies in Japan and the Asia-Pacific region.

Previously, he was senior vice president, chief financial officer and chief financial actuary of institutional markets for AIG Commercial Insurance. In this role, he was responsible for providing focused financial management and actuarial support at a senior, strategic level supporting the profitable growth of the institutional markets business. Dowrich joined AIG in May 2013.

Prior to joining AIG, he served as vice president of risk and capital markets in the financial institutions group for Goldman Sachs, where he was co-head of the Americas insurance debt capital markets and a senior member of the insurance risk management advisory team. Before that, he held the role of vice president, insurance solutions group, at Credit Suisse, and vice president, head of corporate planning and analysis for life and health at Swiss Re. Dowrich earned an MBA in finance from the Wharton School of the University of Pennsylvania and his bachelor's degree in actuarial science and applied statistics from the University of Toronto. He is a Fellow of the Society of Actuaries, Associate of the Canadian Institute of Actuaries and a member of the American Academy of Actuaries.

Lin Du, Ph.D.*Deputy Director**Fund Regulatory Supervisory Division of Insurance Fund Management Regulatory Department, China Insurance Regulatory Commission*

Lin Du has a Ph.D. in finance from Peking University. He has been working in CIRC since 2004. Du has served in different CIRC departments including statistics and IT, as well as in the general office. Currently, he is the deputy director of the fund regulatory supervisory division of insurance in the fund management regulatory department.

Ann Henstrand*Senior Director, Asia and Latin America
Society of Actuaries*

Ann Henstrand is the senior director of Asia and Latin America at the Society of Actuaries (SOA). She joined the SOA in April of 2015. In her position, she is responsible for coordinating the SOA's international activities and staff in China, Asia-Pacific and Latin America to support members, candidates and stakeholders.

Prior to joining the SOA, Henstrand served as senior global regulatory consultant for Rector and Associates, a regulatory consulting firm, doing work for insurers on a variety of U.S. and international matters.

Previous to Rector, Henstrand served as the chief industry and government affairs officer at ACORD Corporation for six years. ACORD is a U.S. insurance industry organization responsible for establishing and advocating for the world-wide development and maintenance of data standards and models in the insurance industry. She also worked for Catlin, Metropolitan Life Insurance, and Barnert Associates in insurance, government, and public affairs roles, including work with insurance supervisors in Australia, India, China, Singapore and the U.K, and involvement as an industry representative with the International Association of Insurance Supervisors and other global groups

Henstrand earned her master's degree in international affairs from Columbia University in 1988 and her bachelor's degree in Asian studies from the University of California at Santa Barbara in 1980. She lived and worked in Hong Kong, Taiwan and Mainland China in the early 1980s, and has traveled extensively all over the world.

Henry Hu, FSA, FCAA*Chief Actuary**Aviva-Cofco Life*

Henry Hu, FSA, FCAA, is the chief actuary of Aviva-Cofco Life Insurance. He has a wealth of experience in product development and the actuarial industry. Hu is a Fellow of the Society of Actuaries and the China Association of Actuaries.

Huiyong Li*Managing Director and Chief Macro Analyst
Shenyin Wanguo Futures Co., Ltd.*

Huiyong Li is the managing director and chief macro analyst at Shenyin Wanguo Futures Co., Ltd., the executive director of the Shanghai Financial Association, the expert committee member of the China Insurance Security Fund Committee, as well as the master supervisor at the Shanghai Advanced Institute of Finance. He has studied macroeconomics and its the impact upon asset allocation for 17 years. He has won many awards, including the award of Best Analyst for several institutions including the New Fortune, Shuijingqiu, Jinniu and the China Business Network. He has also received top recognition at the China Economic Group of Vision Cup-Global Macroeconomic Forecast Spring Forum, as the most influential economist of the year in the China Financial Value Ranking and the best analyst of economy and strategy in the *Institutional Investor*.

Qu Liu, FSA, FCAA*Assistant President and Chief Actuary
Taikang Insurance Group*

Qu Liu, FSA, FCAA, is a Fellow of both the China Association of Actuaries (CAA) and the Society of Actuaries (SOA). He currently works as the assistant president and chief actuary of Taikang Insurance Group Inc., assistant president and chief actuary of Taikang Life Insurance Co., Ltd. and the deputy secretary general of the CAA. During his 18 year-long career in the actuarial industry and corporate management, Liu has accumulated extensive experience in both insurance and the actuarial profession.

Jason Ma, FSA, MAAA*President & CEO**TransGlobe Life Insurance Company, Taiwan*

Jason Ma, FSA, MAAA, has been the president and CEO of TransGlobe Life Insurance Company in Taiwan since 2015. He is responsible for the overall management of the company, including developing the long-term strategy and tactic plan.

Prior to his current role, Ma joined AEGON-CNOOC Life insurance Company in 2006, where he was senior vice president, corporate development and executive vice president. He served as president and CEO from 2011 to 2014.

Before joining AEGON-CNOOC, Ma was the founding CEO of ACE Life Insurance (Taiwan). Previously, he was the vice president of AIG Nan Shan Life Insurance. During this 10 year period, he was responsible for the actuarial, product development, bancassurance and operations functions.

Ma earned an EMBA degree from China Europe International Business School and a M.S. in actuarial science from the University of Nebraska-Lincoln. He is a Fellow of the Society of Actuaries and a Member of the American Academy of Actuaries.

Chua Tuan Miang, FIAA, MEc*Regional General Manager,**Gen Re Life/Health Asia*

Chua Tuan Miang, FIAA, MEc, is the regional general manager of Gen Re Life/Health Asia. He oversees Gen Re Life/Health in ASEAN, China, Hong Kong and India. Tuan has nearly 22 years of experience in the life insurance and reinsurance industries. He joined Gen Re in 2001, working out of the Shanghai office. He has helped establish Gen Re Life/Health in China and Hong Kong, where he works with many insurance companies to develop various health insurance products. Prior to his current role, he gained valuable management, product development and actuarial experience in countries including Malaysia, Singapore and Australia. Tuan is a Fellow of the Institute of Actuaries of Australia.

Flora Shao, FIA, MEc*Chief Pricing Actuary**Gen Re Life/Health China*

Flora Shao, FIA, MEc, is the chief pricing actuary at Gen Re Life/Health China. She is responsible for pricing and product research and development, providing actuarial advice and technical support for Gen Re's clients in China. Before joining Gen Re, she worked for a direct life insurance company and a consulting firm, working on product pricing, actuarial valuation, strategic planning and merger and acquisition projects. She holds a master's degree in economics and is a Fellow of the Institute of Actuaries (FIA).

Wenli Su*Assistant President**Sunshine Insurance Group*

Wenli Su joined Sunshine Insurance Group in 2012 as the assistant president. Su is responsible for the internet center, operating center, IT center, Big Data center and the "future center". He has led various internal projects in Sunshine Insurance Group, including:

- The creation of the internet insurance portal based on the E-commerce model and the centralization of operation sharing;
- The IT center division reform;
- The Big Data strategy implementation project; and
- The development of products such as the credit rewarding system, insurance cards and more, based on the block chain technology.

Prior to 2012, Su worked as the deputy general manager of science and technology at the Industrial and Commercial Bank of China. The projects he led were awarded the third prize of the Scientific and Technological Progress at the national level and the first prize of Scientific and Technological Progress at the provincial and ministerial level. In 2000, Su received the Special Government Allowance Award from the State Council.

Lingling Wang, FSA, CERA, MAAA*Deputy Chief Actuary**Ping An Group*

Lingling Wang, FSA, CERA, MAAA, has been the deputy chief actuary of Ping An Insurance (Group) Company of China since 2014. She is responsible for the coordination and supervision of actuarial functions for the entire group. She is actively involved in the rule setting stage of the IAIS international capital standard, with the goal of appropriate consideration for the China insurance industry.

Wang joined Ping An Life Insurance Company as the deputy general manager in 2012. Prior to joining Ping An, she served as vice president and chief actuary of Taikang Life Insurance Company in Beijing and as the chief actuary of Sino-Life Insurance in Shanghai. Before coming to China, she held various actuarial titles at Principal Financial Group in United States. With more than 28 years of experience in various actuarial disciplines, she is knowledgeable about the life insurance markets in both China and the United States.

Wang holds a bachelor's degree in law from National Chengchi University in Taiwan and a master's degree in actuarial science from the University of Iowa in the United States. She was recognized for outstanding academics at both institutions. She is a Fellow of the Society of Actuaries (FSA), a Chartered Enterprise Risk Analyst (CERA) and a Member of American Academy of Actuaries (MAAA). She currently serves as a council member for China Association of Actuaries.

Jason Yao, FSA

*Executive Director
Group Executive Vice President
Group CFO
Chief Actuary
Ping An Group*

Jason Yao, FSA, MBA has been the executive director of Ping An Insurance (Group) Company of China since June 2009. He also serves as the executive vice president, chief financial officer and chief actuary of the company. Yao is responsible for the group's strategy development, corporate planning and financial reporting. Prior to his current role, he served as the senior vice president and in other senior management positions within Ping An. Before working at Ping An, he was a senior manager and consulting actuary at Deloitte Touche Tohmatsu in Hong Kong. Yao is a Fellow of Society of Actuaries (FSA) and holds an MBA from New York University.

Xiaodong Yu, FSA

*General Manager, Risk Management Department
Chief Risk Officer, Insurance Group
Fosun Group*

Xiaodong Yu, FSA, joined Fosun Group in August 2016 as the general manager of risk management and chief risk officer of the insurance group. He also serves as non-executive director at Peak Reinsurance Company Limited in Hong Kong and at Portugal's largest insurer, Fidelidade—Companhia de Seguros, S.A.

Before joining Fosun, Yu was a senior executive at China Taiping Insurance Group in Hong Kong for nearly 15 years. He took a leading role in establishing and implementing the company's management system in corporate planning, actuarial and risk management. He led the group risk appetite system project and the implementation of C-ROSS within Taiping Group. He also concurrently acted as the appointed actuary of China Taiping Life Insurance (Hong Kong) and Taiping Reinsurance, chief actuary of Taiping Pension and has served as a director or supervisor on the boards of various core insurance subsidiaries of Taiping Group. Yu started his actuarial career in the actuarial department of AIA China's home office in Shanghai, focusing on product development, pricing and experience analysis.

Yu received a master's degree in applied mathematics and a bachelor's degree in control science from Fudan University. He has been a Fellow of the Society of Actuaries (FSA) since 2003, a Fellow of the Actuarial Society of Hong Kong, as well as an executive council member, founding member and Fellow of The China Association of Actuaries (FCAA). He is also a Fellow of the Life Management Institute (FLMI) and a Certified Internal Auditor (CIA).

Xiaobin Yuan, FSA

*Partner
PwC A7 Actuarial Services*

Xiaobin Yuan, FSA, is a partner at PricewaterhouseCoopers' A7 Actuarial Services based in Shanghai, China. He is responsible for providing actuarial and financial advisory services to multinational and local insurance companies and broader financial institutions in Greater China. Prior to joining PwC, he worked for a joint-venture life insurer in Shanghai.

Yuan has worked on various projects regarding IFRS 4 phase II and IFRS 17 for various domestic and multinational insurers across the region, such as providing advisory services on the interpretation of the principles and rules, as well as their implications to the actuarial industry, assessing the potential financial impact from the implementation of IFRS 17, operation implications of IFRS 17, as well as field tests. He has also helped insurers to assess the implications of IFRS 9.

Yuan has more than 15 years of experience in the insurance industry across East Asia. He has extensive experience and knowledge in financial reporting areas including IFRS, embedded value, US GAAP, solvency II, C-ROSS and local statutory bases. In addition, he has worked on asset liability management, economic capital, mergers and acquisitions activities, Prophet modeling, internal and external audit work coordination and resolution, special strategic projects such as new market entry and training for local actuarial and finance teams. He is a Fellow of the Society of Actuaries (FSA).

Moderators

Ling Guan, FSA, FCAA

Senior Executive

Funde Insurance Holding Co., LTD

Ling Guan, FSA, FCAA, joined Funde Insurance Holding Co., Ltd as the deputy general manager and chief financial officer in 2016. Previously, he worked for the China Insurance Regulatory Commission. Prior to that, Guan was the director of supervision section II, working in the finance and accounting department (solvency supervision department) and directly participated in the establishment of the China Risk Oriented Solvency System (C-ROSS), including but not limited to the planning, framework and standards of C-ROSS.

He graduated with a master's degree in financial mathematics from Peking University in 2000. He obtained his Fellowship from the Society of Actuaries (FSA) in 2003 and his Fellowship from the China Association of Actuaries (FCAA) in 2005. In 2014, he was referred to be an IAA Regulatory Commission member by the China Association of Actuaries.

Sharon Huang, FSA, FCAA, FLMI

Director and Consulting Actuary

Milliman

Sharon Huang, FSA, FCAA, FLMI is director and consulting actuary at Milliman's Beijing office. She joined the firm in 2011. In her current role, she manages various projects and provides support to local and multinational insurance companies in the areas of actuarial due diligence, product design, pricing and financial reporting. Prior to joining Milliman, Huang worked at the largest life reinsurer in China for 6.5 years and gained experience in reinsurance, product development, market research, alternative distribution channel management and market entry strategy.

She has worked with life insurers in China on projects pertaining to:

- Due diligence and EV appraisal on M&A deals;
- Economic capital modeling;
- Risk appetite framework setup;
- ERM risk management information system;
- Asset-liability management modeling;
- Actuarial audit on statutory reserve, China GAAP reserve and dynamic solvency test;
- Alternative distribution channels;
- Market/product entry strategy review;
- Business planning; and
- Product development.

Huang is fluent in Chinese and English.

Shu-yen Liu, FSA, CERA, MAAA

Practice Leading Partner

PWC

Shu-yen Liu, FSA, CERA, MAAA, has more than 35 years of experience in the insurance industry in the United States, Europe and Asia. Liu has extensive experience and knowledge in financial reporting areas such as embedded value, US GAAP, IFRS, solvency II, C-ROSS, RBC and local statutory bases. She has worked on product pricing, hedging strategies and reinsurance arrangements for variable annuities with living benefit options, enterprise risk management and economic capital, ALM implementation, M&A activities, internal and external audit work coordination and resolutions, special strategic projects such as new market entry, as well as training for local actuarial and finance teams. Liu has worked with multinational insurance companies, investment banks, fund managers and cross border projects throughout her consulting career. Her knowledge has helped many clients working with multiple functional teams to identify areas of improvement, as well as find alternatives and solutions.

She is a Fellow of the Society of Actuaries (FSA), a member of the American Academy of Actuaries (MAAA), a Chartered Enterprise Risk Analyst (CERA), a member of the Hong Kong Actuarial Society and a member of the Thailand Society of Actuaries.

Xiaojun Wang, FCAA

Associate Dean of School of Statistics, Director of Center for Risk Management and Actuarial Studies Renmin University of China

Xiaojun Wang is professor and director for the Center for Risk Management and Actuarial Studies, as well as associate dean of the school of statistics at Renmin University of China. She is a Fellow of the China Association of Actuaries, executive member of the Insurance Society of China and executive member of the China Social Insurance Association. Her main research interests includes longevity risk, risk analysis and actuarial valuation for pension plans, as well as social security.

Zhikang Yan, FSA, FCAA

Chief Operating Officer

Deputy Chief Actuary

Taiping Life

Zhikang Yan, FSA, FCAA, is the chief operating officer and deputy chief actuary at Taiping Life Insurance Co. Ltd. He graduated with a math degree from Fudan University. Yan is a Fellow of the Society of Actuaries (FSA) and the China Association of Actuaries (FCAA). He was a member of the board of supervisors of TPL. Yan previously worked in joint-venture insurance companies such as Manulife-Sinoch before joining TPL.

Xu Zeng, FSA, FCAA

Chief Actuary

General Manager, Actuarial Dept.

CCB Life

Xu Zeng, FSA, FCAA, now serves as chief actuary and general manager of the actuarial department at CCB Life. His main responsibilities include product pricing and development, marketing strategy and business planning, actuarial valuation and management, capital management and ALM under C-ROSS. Before joining CCB Life, Zeng worked in both product and actuarial departments in several joint-venture companies in mainland China. He has years of experience in product development and management, as well as in actuarial management and operations.

Zeng graduated from Nankai University with master's degree in 2000. He is a Fellow of Society of Actuaries and a fellow of the China Association of Actuaries.





开幕式和主题演讲嘉宾

Mike Lombardi, FSA, CERA, FCIA, MAAA
SOA当选主席

Mike Lombardi 目前是MLBC精算公司的总裁，该公司为保险公司提供商业策略、兼并收购、再保险及企业精算挑战等方面的建议。Lombardi曾任英国保诚保险有限公司的高级副总裁兼总精算师，曾任WTW韦莱韬悦加拿大人寿险、财产险和责任险咨询业务主管，也曾担任RGA美国再保公司的执行副总裁。

Lombardi先生同时也是SOA的当选主席，即将于2017年十月份继任SOA主席一职。他之前曾任SOA副主席，与SOA董事会共事。Lombardi曾任加拿大精算学会（CIA）主席，且曾是CIA国际关系委员会的主席。

盛松成
前央行调查统计司司长

盛松成，教授、研究员、博士生导师，享受国务院政府特殊津贴，现任中国人民银行参事（正厅局级）、中国互联网金融协会统计分析专业委员会主任、中欧国际工商学院教授，中国人民银行调查统计司原司长。多年来，先后在《中国社会科学》、《经济研究》、《金融研究》和《中国金融》等重要刊物发表专业论文100余篇，并出版多部著作。近年来，提出协调推进利率、汇率改革与资本账户开放的理论，并在社会融资规模指标的研究、编制和推广中作出突出贡献。

赵宇龙, PhD, HFIA
中国保监会财务会计部（偿付能力监管部）主任

赵宇龙博士具有17年以上的保险监管经验，主要负责保险业偿付能力、财会、税务等方面的政策协调和监管。他对中国风险导向的偿付能力体系（偿二代）的建设和实施做出了重大的贡献。

赵宇龙博士拥有上海财经大学的会计学博士学位和中欧国际工商学院（CEIBS）的MBA学位。他是中国精算师协会始创会员，也是中国大陆被选出的第一位荣誉英国精算师。他担任财政部中国会计准则咨询专家，中国注册会计师协会会员和中国税务学会理事，是北京大学兼职教授和中国社会科学院特聘博士生导师。

专题演讲嘉宾

李慧勇

申银万国证券研究所董事总经理、首席宏观分析师

李慧勇，申银万国证券研究所董事总经理、首席宏观分析师，上海市金融协会常务理事，中国保险保障基金专家委员会委员，上海高级金融学院硕士生导师。从业17年，主要研究方向为宏观经济及其对资产配置的影响。曾获得国内外诸多大奖，包括：新财富、水晶球、金牛、第一财经最佳分析师第一名；远见杯中国经济预测第一名、远见杯世界经济预测第一名；第一财经金融价值榜年度最有影响力机构经济学家；《II(机构投资者)》经济和策略最佳分析师。

杜林

保险资金运用监管部资金监管处副处长

杜林，北京大学金融学博士，2004年至今在中国保险监督管理委员会工作，先后任职于统计信息部、办公厅，现任保险资金运用监管部资金监管处副处长。

袁晓斌

普华永道亚洲精算服务合伙人

袁晓斌先生是普华永道亚洲精算服务的合伙人。他的主要职责是为大中华区广大的国内及跨国寿险公司及金融机构提供精算和保险咨询相关服务。在加入普华永道之前，他在上海的一家合资寿险公司工作。

他过去为多家国内及海外保险公司提供过与IFRS 4 Phase II/IFRS 17相关的咨询服务。咨询服务的内容包括：IFRS 17的原则解读、示例分析、实施问题评估、财务影响评估、实地测试等服务。他也帮助寿险公司评估IFRS 9的实施对保险公司的影响。

袁先生有超过15年的行业经验。他在IFRS、内含价值评估、US GAAP、欧洲偿付能力II、C-ROSS以及亚洲多个国家或地区的法定评估等财务报告体系具有丰富的经验。另外，他还在保险公司资产负债管理、经济资本、Prophet建模、保险公司并购服务、审计、市场进入等战略咨询、精算和财务培训等方面提供广泛的咨询服务。对于IFRS 4 Phase II的原则解读、具体实施，以及评估对公司的影响上积累了较为丰富的经验。

袁先生是北美精算师(FSA)。

陈福生,FSA

太保安联健康保险股份有限公司精算部总经理

全面负责精算部，开展产品开发、精算评估、再保险等工作，包括产品开发与定价、准备金评估、经验分析、偿付能力管

理、再保险管理等。

曾负责太保集团寿险精算平台管理，作为项目经理开展太保Prophet精算模型转换项目实施，建立太保Prophet精算评估模型与运行平台，开展准备金变动、会计利源分析、偿二代内含价值、内含价值变动等复杂精算分析的方案设计与模型实施。

加入太保之前，在中美联泰大都会精算部任财务精算经理，负责预算、利润预测、内含价值、经验分析等财务精算相关工作；曾负责代理人渠道产品开发与定价、基本法等工作。在此之前，在复旦大学数学科学学院担任2003级本科辅导员。

于晓东,FSA

复星集团风险管理部总经理

复星集团保险集团首席风险官

于晓东先生现任复星集团风险管理部总经理兼保险集团首席风险官，同时还担任鼎睿再保险有限公司、葡萄牙忠诚保险公司的非执行董事。

在加入复星前，于先生在中国太平保险集团香港总部服务近15年，曾担任集团业务管理部、企划精算部总经理、集团合规负责人、风险管理及合规部总经理等，负责建立并实施集团企划、精算、全面风险管理体系，曾负责实施了全集团风险偏好体系建设和偿二代体系落地项目；亦曾兼任中国太平人寿保险(香港)、太平再保险委任精算师、太平养老总精算师，以及多家太平核心保险企业的董事、监事。加入中国太平前，任职于友邦保险中国区总部精算部，从事产品开发、定价和经验分析。于先生于复旦大学数学系取得理学硕士和学士学位。他是北美精算学会、香港精算学会会员、中国精算师协会常务理事、创始会员，亦拥有美国寿险管理师、国际注册内部审计师资格。

蔡端绵,FIAA

通用再保险公司亚洲区寿险健康险总经理

蔡端绵先生是通用再保险亚洲区总经理，负责东南亚、中国大陆、香港和印度地区的寿险健康险业务。蔡先生在人寿保险和再保险业有近22年的经验，他于2001年加入Gen Re上海办公室，在之后的数年里在中国大陆和香港与许多保险公司合作开发各种保障型和健康保险产品，逐步构建了Gen Re寿险健康险在大陆和香港的经营架构。在此之前，他在马来西亚，新加坡和澳大利亚等国家获得了丰富的管理经验及产品开发和精算领域的工作经验。蔡端绵先生是澳大利亚精算师协会精算师。

邵红,FIA, FCAA

通用再保险公司上海分公司寿险健康险首席定价精算师

邵红女士主要负责通用再保险中国区寿险健康险业务的产品研发及精算定价，为通用再的中国客户提供建议及技术支持。在加入通用再之前，她多年服务于中国寿险业，先后就职于直保公司及咨询公司，在产品开发、业务发展计划评估及保险公司

战略并购等领域累积了丰富的经验。

邵红毕业于上海财经大学，获经济学硕士学位。她是中国精算师协会正会员及英国精算学会精算师。

胡敏,FSA, FCAA

中英人寿总精算师

中国精算师协会和北美精算师协会正式会员，现任中英人寿总精算师，在精算实务和产品开发方面有着较为丰富的工作实践。

苏文力

阳光保险集团总裁助理

苏文力，阳光保险集团公司，任总裁助理，分管过互联网中心、运营中心、IT中心、大数据中心及未来中心，率先建设基于电商模式的保险互联网门户，实现集团保险运营共享集中工程，组织开展了IT中心事业部改革，组织大数据战略实施工程，开发了基于区块链的积分、保险卡单等产品。2012年前就职于中国工商银行，曾任科技部副总经理，主持参与的项目曾获国家科技进步三等奖，多次获省部级科技进步一等奖，2000年获国务院政府特殊津贴。

毕海,FSA

好啦科技首席执行官

毕海是北京好啦科技有限公司CEO，他是一位健康险精算师，在健康保险领域有18年的工作经验。“好啦科技”致力于基于人工智能为客户提供定制化的健康资讯和建议。“好啦科技”的客户包括22家保险公司以及4家医院。毕海在传统保险领域有诸多热销产品的开发经验之外，在互联网领域，主导了“求关爱”、“乐业保”等开创先河的创新产品开发。目前，“好啦科技”已经协助多家保险公司在互联网健康保险领域进行了不少成功的创新。

姚波,FSA

中国平安保险(集团)执行董事、常务副总经理、首席财务官、总精算师

姚先生自2009年6月起出任本公司执行董事，现任本公司常务副总经理、首席财务官及总精算师。姚先生负责集团战略规划、预算管理及财务报告编制。姚先生于2001年加入公司，此前曾先后出任本公司副总经理等多个高级管理职位。在加入本公司前，姚先生任德勤会计师事务所咨询精算师、高级经理。姚先生是北美精算师协会会员(FSA)，并获得美国纽约大学工商管理硕士学位。

刘渠,FSA,FCAA

泰康保险集团助理总裁兼总精算师

泰康人寿助理总裁兼总精算师

刘渠，持有中国和北美精算师资格证书。目前任泰康保险集团股份有限公司助理总裁兼总精算师，兼泰康人寿保险有限责任公司助理总裁兼总精算师，并兼任中国精算师协会副秘书长一职。

刘渠先生从事精算专业和管理工作近18年，积累了较为丰富的保险、精算工作经验。

马君硕, FSA, MAAA

台湾全球人寿总经理

马君硕于2015年，加入台湾全球人寿，担任总经理一职。负责公司全面管理，并制定新的战略，以达成商业目标。

马君硕在2006年加入海康人寿。历任企业规划高级副总经理、常务副总经理等职务，并于2011-2014年升任CEO兼总经理，负责公司全面管理。

加入海康之前，在台湾筹建ACE集团中泰人寿，担任第一任CEO，从执照申请审批、系统开发及营运准备、渠道发展到正式开业。马君硕早期在AIG南山人寿，在超过10年的工作期间，分别负责过精算、商品研发、银行保险及营运等部门。

马君硕拥有美国内布拉斯加州立大学精算硕士学位、中欧国际工商学院EMBA，他同时也是北美精算师、美国精算学会会员。

Ann Henstrand(韩安美)

SOA亚洲和拉丁美洲高级总监

Ann Henstrand在SOA北美精算师协会中担任亚洲和拉丁美洲高级总监。她从2015年4月加入SOA，负责协调SOA的国际事务和中国、亚太地区及拉丁美洲的员工，为会员、考生及其他相关方提供支持。

在加入SOA之前，Henstrand在Rector and Associates监管咨询公司担任高级全球监管咨询顾问一职，为很多保险公司提供过关于美国和国际事务的服务。

在加入Rector之前，Henstrand在ACORD公司工作了六年，担任行业及政府事务首席行政官。ACORD是美国的一家保险行业机构，负责构建和倡导全球发展及保险行业内的数据标准和模型的维护。她也曾在Catlin、Metropolitan人寿保险公司、Barnet Associates任职，负责保险、政府及公共事务等领域。工作内容包括：与澳大利亚、印度、中国、新加坡及英国的保险监管机构共事，作为保险行业代表与国际保险协会监管人员及其他国际组织接触。

Henstrand毕业于哥伦比亚大学，获国际关系硕士学位；毕业于加州大学圣芭芭拉分校，获亚洲研究本科学位。1980年代，她曾在香港、台湾、中国内地工作及生活，也曾在全球范围内出差或旅行。

陈秀娟,FCAA

太平洋人寿总精算师

陈秀娟女士先后毕业于湖南财经学院、复旦大学、中欧国际工商学院，拥有中国精算师资格，同时担任中国精算师协会常务理事。陈女士在精算行业拥有20多年的从业经验，有着全面深厚的保险精算理论知识，在产品定价、精算评估等保险精算领域有着深刻认识和丰富的实践经验。自1995年先后任太平洋寿险精算部副总经理、总经理及总精算师，全面主持精算部各项工作，取得了丰富的经营管理经验。

王玲玲,FSA,CERA,MAAA

平安集团副总精算师

从2014年起，王玲玲女士一直担任中国平安保险（集团）股份有限公司的副总精算师，负责协调及监督整个集团的精算运作。她积极参与IAIS国际资本标准的规则制定阶段，目的是为中国保险行业作适当的考虑。

王女士于2012年加入中国平安人寿保险公司，担任副总经理。在此之前，她先后在北京的泰康人寿保险公司担任副总裁兼总精算师，及在上海的富德生命人寿担任总精算师。在回国之前，她在美国信安金融集团任职过不同的精算职务。凭着28年的精算从业经验，王女士对中国和美国的人寿保险市场较为熟悉。

王玲玲女士先后由于优异的成绩，获得了毕业于台湾国立政治大学法律系学士学位，及美国爱荷华大学精算系的硕士学位。她是北美精算师协会（SOA）的正式会员，也是美国精算学会（MAAA）的会员，目前还是中国精算师协会的理事会委员。

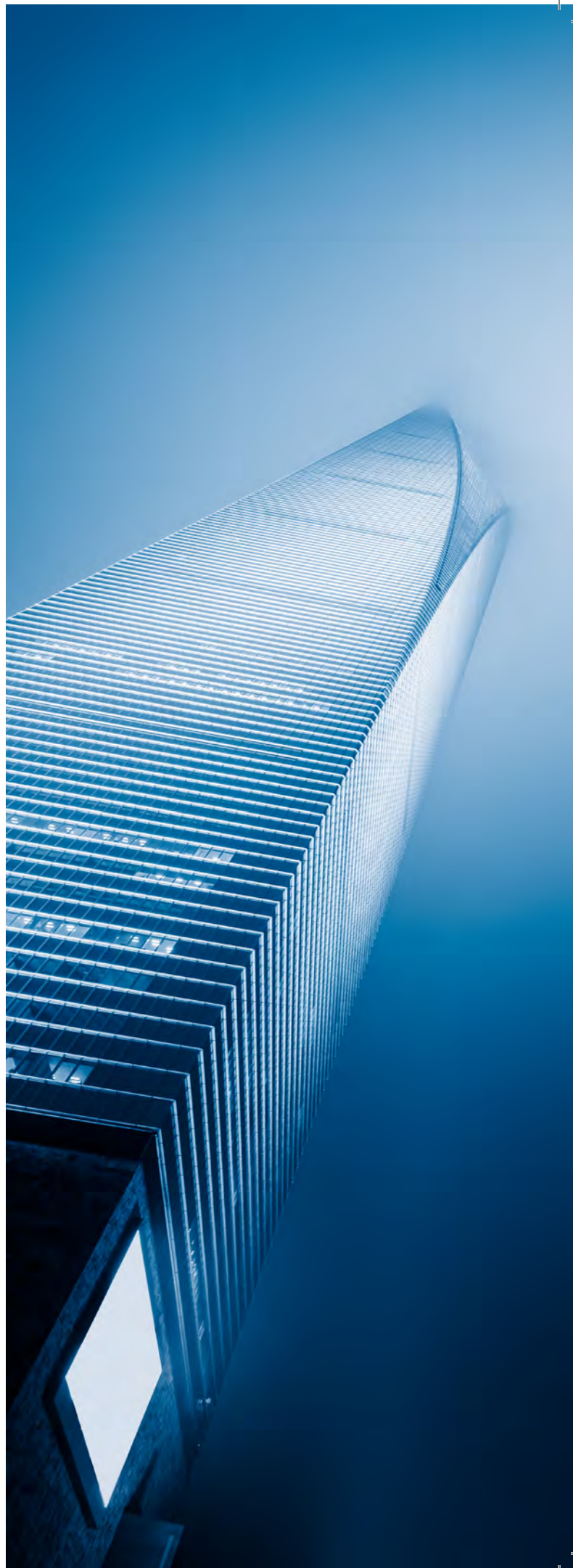
Dave Dowrich,FSA,ACIA,MAAA

美国国际集团公司日本地区管理高层和亚太区个人险业务的首席财务官

Dave Dowrich 现任美国国际集团公司日本地区的管理高层和亚太区个人险业务的首席财务官，主要负责集团在亚太地区的财务管理工作。另外，还负责亚太区财务会计、税务、精算、资本管理和相关财务运营变革部门的日常运营工作。同时，他还担任美国国际集团在日本和亚太区多家公司的董事。

在加入美国国际集团日本之前，Dave担任美国国际集团商业保险业务机构市场部的资深副总裁、首席财务官和首席精算官，主要负责给机构市场部以可营利性增长为目标在战略层面的财务和精算支持。Dave在2013年5月加入美国国际集团。

加入美国国际集团之前，Dave担任高盛集团金融机构部风险与资本市场方面的副总裁，同时，他也是美国保险债务资本市场的联合负责人和风险管理咨询机构的资深会员。在此之前，Dave担任瑞士信贷保险解决方案部门副总裁和瑞士再保险公司健康意外险的战略和计划部负责人。Dave拥有宾州大学沃顿商学院MBA学位和多伦多大学的保险精算和应用统计本科学位。他同时也是北美精算师、加拿大副精算师和美国精算学会会员。



主持人

刘淑艳, FSA, FCAA, MAAA

普华永道亚洲保险并购及精算咨询服务合伙人

刘淑艳女士目前是普华永道亚洲保险并购及精算咨询服务合伙人。她的主要职责包括提供亚洲的跨国公司和本地公司在保险和更广泛的金融机构提供精算和财务咨询服务。

在加入普华永道之前，刘淑艳曾在一家美国公司负责整个企业经济资本方法和模型，包括寿险，财产险和健康险。她还是亚洲首席精算师，负责亚洲地区的经济资本和并购活动，还主管精算和风险管理及尽职调查的执行工作，包括交易完成后的运营及财务跟踪工作。

刘淑艳女士在美国，欧洲和亚洲拥有超过35年的保险业经验。刘淑艳在以下方面有着丰富的经验：如产品定价、风险规避策略和再保险安排、国际会计准则、国内法定以及美国公认会计准则的财务报告、企业风险管理、资产负债管理的实施、经济资本与风险资本的方法与运用、企业并购活动、内部和外部审计工作协调和各项决议、特别战略性项目，如新的市场准入和培训。为银行和资产管理公司的不良资产管理提供咨询服务。她的知识和经验为众多的客户找出改善和寻找替代品和解决方案。

刘淑艳有着多年的产险行业从业经验，曾为多家亚太区的产险公司提供准备金评估、车险定价方面精算估值方面的服务。她也曾为多家产险公司提供差异分析服务，帮助保险公司识别操作弱点和主要风险点，同时建立预警系统以减少不必要的理赔成本，从而提高运营效率。基于她在行业内多年的经验和洞察，她曾为多家保险公司提供了优秀的解决方案。

她拥有中国精算师协会，北美精算学会，美国精算学术学会，香港精算学会及泰国精算学会正会员的资格。

黄雪昀, FSA, FCAA

明德丰怡精算咨询总监兼精算咨询顾问

黄雪昀现为明德北京公司的总监兼精算咨询顾问，她于2011年加入公司。她主要负责管理不同类型的项目，并为本地及跨国保险机构提供精算评估、风险管理、产品设计开发、兼并收购尽职调查等方面的咨询服务。

在加入明德之前，黄雪昀就职于中国最大的人寿再保险公司六年半时间，积累了丰富的再保险，产品开发，市场调研，销售渠道管理以及市场开拓策略的经验。

她近期在国内领导或参与的主要项目包括：

- 涉及兼并收购交易的尽职调查和内含价值评估
- 经济资本计量
- 风险偏好体系搭建
- 风险管理信息系统开发
- 资产负债管理建模
- 中国法定及会计准备金的精算审计及动态偿付能力测试
- 保费厘定
- 产品及市场进入策略咨询
- 业务计划审核

黄雪昀具有流利的中英文语言能力。

关凌, FSA, FCAA

富德保险控股股份有限公司拟任副总经理、财务总监

关凌先生是富德保险控股股份有限公司拟任副总经理、财务总监。长期在中国保监会任职，曾任中国保监会财务会计部（偿付能力监管部）监管二处处长，全程直接参与了中国风险导向的偿付能力体系建设（C-ROSS）的规划、框架和标准的建设工作。

关先生2000年北京大学数学学院金融数学系硕士毕业。2003年获得北美精算师资格，2005年获得中国精算师资格。2014年经中国精算协会推荐当选为IAA监管委员会委员。

严智康, FSA, FCAA

太平人寿保险有限公司运营总监、副总精算师

严智康先生现任太平人寿保险有限公司运营总监、副总精算师。

严先生毕业于复旦大学数学系，获得北美精算师(FSA)资格，为北美精算师协会和中国精算师协会正式会员。

严先生曾任太平人寿监事，加入太平人寿之前也曾在中宏人寿等合资保险企业任职。

曾旭, FSA, FCAA

建信人寿总精算师、精算部总经理

曾旭先生现任建信人寿保险股份有限公司总精算师，精算部总经理。主要负责公司产品开发与定价，市场业务策略及规划，精算评估及管理，偿二代资本管理以及参与相关的资产负债管理。加入建信人寿之前，先后任职于合资寿险公司产品开发、精算部门，在产品开发及管理、精算管理及运用具有较为丰富的经验。

曾旭先生于2000年毕业于南开大学，获金融学硕士学位。具有北美精算师资格，是中国精算师协会会员。

王晓军

中国人民大学统计学院副院长，风险管理与精算中心主任

王晓军，中国人民大学统计学院副院长，教授，博士生导师。风险管理与精算中心主任，中国精算师协会正会员、理事，中国保险学会常务理事，中国社会保险学会常务理事，中国统计教育学会常务理事，中华预防医学会健康保险专业委员会副主任。正在担任“中欧社会保障合作项目的特聘专家”，曾任“世界银行精算能力建设项目的特聘专家”。主要研究领域包括：人寿保险、养老金和社会保障的风险管理。曾主持完成多项“国家自然科学基金项目”，“国家社科基金项目”、“教育部重点研究基地重大项目”、“财政部委托项目”等。目前正在主持“国家社科基金重大项目：我国养老保障体系应对人口老龄化挑战的对策研究”。



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