



2019 MDRT Top of the Table Annual Meeting e-Handout Material

Title: **From Insurance Agent to Listed Company CEO**

Speaker: Withoon Lertpanomwan

Presentation Date: Friday September 27, 2019

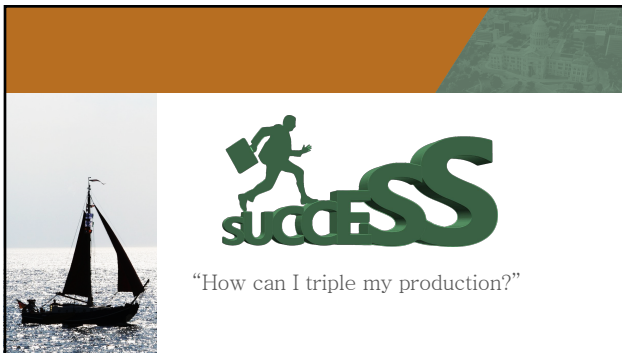
Presentation Time: 1:15 p.m.- 2:00 p.m.

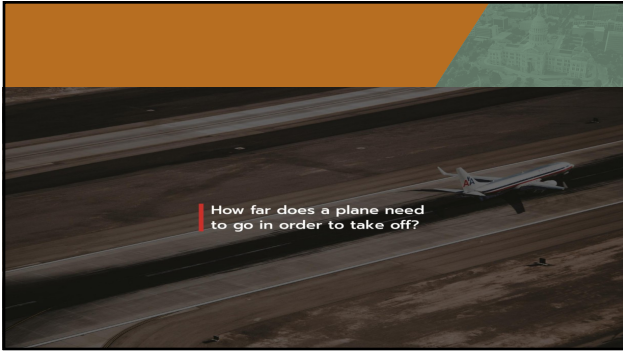
Session Room: Indigo

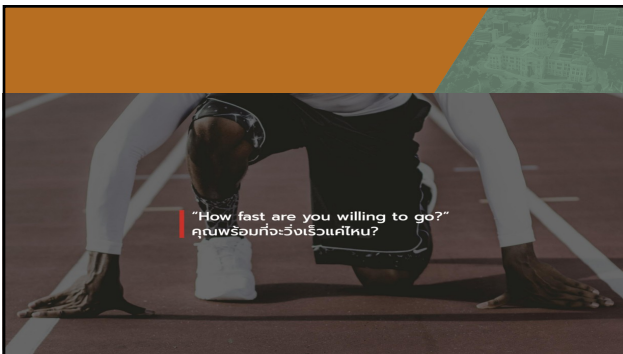
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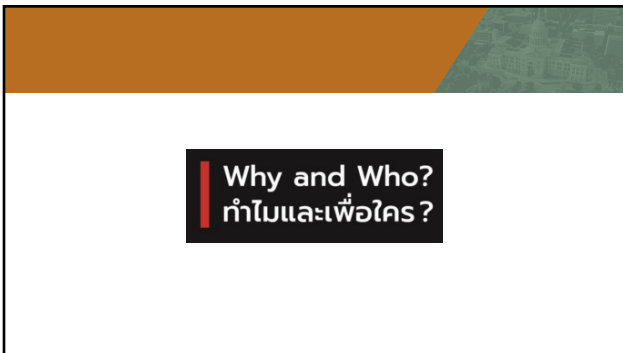




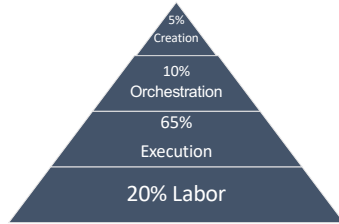








STANFORD UNIVERSITY STUDY



BUILDING AN ORGANIZATION



It is dependent upon the skill and ability of the leader...

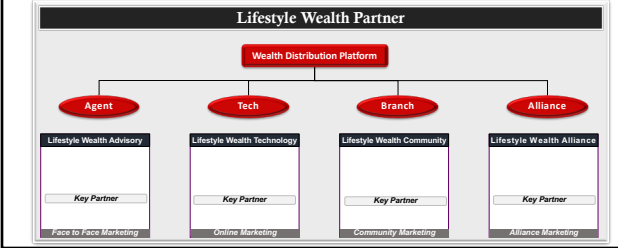


It's not a matter of time ...

7 STRATEGIES FOR TOP ADVISORS

1. Find them the money
 - Fundraising for business (Bond, IPO, PE, Etc.)
 - Creating more money from investment and tax saving
2. Give them more business
 - Client referral
 - Powerful connection among your networks
 - Co-Marketing
3. Platform Provider : Face to Face, Tech, Branch, Alliance

BUSINESS MODEL



7 STRATEGIES FOR TOP ADVISORS

4. Game of Data : BIG Data, AI, Partnership
5. Digital Marketing : Cheaper, Faster, More Impact
6. One size is no longer fit all : Customization, Synergy, Creativity
7. Do joint consulting : Teamwork, Specialist, System

INVESTMENT + FREE PROTECTION CONCEPT

What is your **minimum return** for the **low risk** portion?

2%?

3%?

INVESTMENT + FREE PROTECTION CONCEPT

USD 3,000,000 X 7% = USD 210,000

- 1. Loss 50% = USD 105,000 = 3.50% P.A.
- 2. Loss 25% = USD 157,500 = 5.25%
- 3. Loss 10% = USD 189,000 = 6.30%
- 4. Gain 10% = USD 231,000 = 7.70%
- 5. Gain 25% = USD 273,000 = 9.10%
- 6. Gain 50% = USD 315,000 = 10.50% P.A.

- Bond with over 150% collateral
- Good property fund
- Property with guaranteed rental

4% = USD 120,000
Keep to spend

2.30% = USD 69,000
Use for USD 3M Protection

MY HERO



ANOTHER HERO



OCEAN







IFCG FAMILY



BIGGER FAMILY



BIGGER FAMILY



The Thing we can't do,
is the thing we haven't done.

