



## AIA Singapore

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AIA.COM.SG

Real change to health begins at  
[AIAVitality.com.sg](https://www.aia.com.sg)

## Media Release

### AIA reaffirms focus on wealth protection and management with the reveal of its Wealthbeing by AIA priority for the burgeoning High Net Worth segment

**SINGAPORE, 18 JANUARY 2022** – AIA Singapore today introduced ‘[Wealthbeing by AIA](#)’ – the pairing of Wealth and Well-being – as it accelerates efforts to meet the underserved needs of High Net Worth individuals (HNWIs) seeking protection and growth for both their wealth and health. This aligns with the company’s advocacy for a more well-rounded approach to achieving healthier, longer, better lives.

The leading life insurer believes Wealthbeing by AIA is the future of wealth planning, where legacies are forged not only on wealth but also on health in order to thrive for generations. Wealthbeing by AIA is testament to AIA’s expertise in providing holistic solutions tailored to the individual. This holistic approach transcends financial horizons to maximise growth and fulfilment for HNWIs, with a specially curated suite of wealth and health privileges, bespoke lifestyle experiences and innovative product offerings to help them and their loved ones achieve Wealthbeing.

Ms Melita Teo, Chief Customer and Digital Officer, AIA Singapore, says, “A wealthier life isn’t always better because it comes at the expense of time, freedom and health. We believe that achieving Wealthbeing – the goal of growing your wealth and well-being goes hand in hand, that will allow everyone to truly live healthier, longer, better lives.”



*Legacies forged with Wealthbeing by AIA  
Elevate your wealth, optimise your well-being  
(Click onto the image to view the video)*

Financial well-being (64%), mental well-being (62%) and physical well-being (61%) are the top three dimensions of wellness HNWIs in Singapore prioritise, according to a recent study<sup>1</sup>. Relationships (41%) and Sense of Self (39%) are important for them too, scoring higher than Work (33%) in their list of priorities.

### Pursuit of sustainable investing and ESG commitments

The well-being of the world’s future is also important to HNWIs, and they are walking the talk with 4 in 5 (80%) having sustainable investing and/or Environmental, Social, and Governance (ESG) funds in their investment portfolio. In fact, 47% look to find out if the company they invest with has good ethical policies before investing, where possible.

AIA Group – holding total assets of US\$326 billion<sup>2</sup> – is doubling down on its ESG commitments, recently announcing that the company sold off almost US\$10 billion of investments in coal mining and

<sup>1</sup> *WealthLens™ 2021. Singapore Study (Oct 2021) Agility Research & Strategy. Powered by Affluentia™*

<sup>2</sup> [https://www.aia.com/content/dam/group/en/docs/annual-report/AIA%20Group%20Annual%20Report%202020%20\(Eng\).pdf](https://www.aia.com/content/dam/group/en/docs/annual-report/AIA%20Group%20Annual%20Report%202020%20(Eng).pdf)



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coal-fired power business, and that it won't make new investments in businesses directly involved in coal mining or generating electricity from coal.

The company has set a target of achieving net zero greenhouse gas emissions by 2050 and is committed to the Science Based Target initiatives (SBTi)<sup>3</sup>, which will inform its US\$286 billion portfolio<sup>4</sup> engagement processes.

### Enhanced offering for High Net Worth and Ultra High Net Worth clients

Mr Chin Chung Wen, Chief Distribution Officer, AIA Singapore added, "Having served generations of families in Singapore for more than 90 years, we understand what matters to our clients the most – being financially prepared for every stage in life and having the health to enjoy their best life with their loved ones. Tapping into our decades of expertise in navigating the complexities of wealth planning and health management, we believe our holistic solutions will keep our High Net Worth client segment on top of their game, always."

AIA Singapore will be upskilling 1,000 AIA Financial Services Consultants (AIA FSCs) by 2023 to elevate their financial advisory competencies to better serve the rapidly growing affluent population in Singapore<sup>5</sup>. This upskilling initiative will provide AIA FSCs access to elite Private Banking training and the opportunity to earn the exclusive AIA Prestige Elite Consultant title for service excellence in the affluent and High Net Worth segment.

In 2019, AIA partnered the Wealth Management Institute (WMI) to become the first insurance organisation in Singapore to provide AIA FSCs the same level of training, assessment and IBF certification as private bankers. AIA remains today the only insurer who upskills AIA FSCs with both the Client Advisor Competency Standards (CACS) regulatory examinations and WMI's Certified Private Banker to achieve the IBF Qualified Private Banking certification.

AIA Singapore's wealth management capabilities are also bolstered by trusted stewards of Asia's wealth to ensure superior long-term sustainable results. [AIA Investments](#), the investment arm of AIA responsible for managing US\$330 billion of assets for the Group, has one of the largest teams of investment professionals in Asia Pacific, consisting over 250 investment professionals, and averaging 12 years of experience.

High Net Worth clients will have their protection and growth priorities met by the specially curated [Platinum product series by AIA](#). Through the by-invite-only [AIA Altitude Programme](#), clients who own and maintain AIA policies with total premiums that meet the qualifying premium requirement will get access to an exclusive suite of lifestyle privileges, advanced healthcare services, and bespoke experiences. This includes priority services, complimentary will writing services as well as exclusive perks and event invitations, amongst many others.

There are three membership tiers to the programme, namely AIA Altitude, AIA Altitude Platinum, and the newly introduced AIA Altitude Pinnacle tier for Ultra High Net Worth (UHNW) clients.

For more information on Wealthbeing by AIA campaign and comprehensive wealth management proposition, please visit: [aia.com.sg/wealthbeing](https://www.aia.com.sg/wealthbeing)

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<sup>3</sup> The Science Based Targets initiative (SBTi) is a global body enabling businesses to set ambitious emissions reduction targets in line with the latest climate science, to meet the goals of the Paris Agreement

<sup>4</sup> Investment portfolio size as at June 2021, <https://www.aia.com/en/media-centre/press-releases/2021/aia-group-press-release-20211207.html>

<sup>5</sup> <https://www.straitstimes.com/business/economy/number-of-millionaires-in-singapore-to-surge-62-by-2025-to-437000-report>



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### About AIA

AIA Group Limited and its subsidiaries (collectively “AIA” or the “Group”) comprise the largest independent publicly listed pan-Asian life insurance group. It has a presence in 18 markets – wholly-owned branches and subsidiaries in Mainland China, Hong Kong SAR(1), Thailand, Singapore, Malaysia, Australia, Cambodia, Indonesia, Myanmar, New Zealand, the Philippines, South Korea, Sri Lanka, Taiwan (China), Vietnam, Brunei and Macau SAR(2), and a 49 per cent joint venture in India.

The business that is now AIA was first established in Shanghai more than a century ago in 1919. It is a market leader in Asia (ex-Japan) based on life insurance premiums and holds leading positions across the majority of its markets. It had total assets of US\$330 billion as of 30 June 2021.

AIA meets the long-term savings and protection needs of individuals by offering a range of products and services including life insurance, accident and health insurance and savings plans. The Group also provides employee benefits, credit life and pension services to corporate clients. Through an extensive network of agents, partners and employees across Asia, AIA serves the holders of more than 39 million individual policies and over 16 million participating members of group insurance schemes.

AIA Group Limited is listed on the Main Board of The Stock Exchange of Hong Kong Limited under the stock code “1299” with American Depositary Receipts (Level 1) traded on the over-the-counter market (ticker symbol: “AAGIY”).

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### Notes:

1. Hong Kong SAR refers to Hong Kong Special Administrative Region.
2. Macau SAR refers to Macau Special Administrative Region.