香港保險顧問聯會
THE HONG KONG CONFEDERATION OF INSURANCE BROKERS

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| **Transitioning to High Net Worth Clients: Life Insurance Planning Essentials** | |
| **Date:** | 24 March 2026 (Tuesday) |
| **Time:** | 3pm – 5pm |
| **Mode:** | Zoom |

## Course Outline

- Understand how life insurance planning changes for HNW clients vs. mass market
- Identify the expanded range of needs and planning objectives for affluent clients
- Adapt conversation approaches and positioning for sophisticated clients
- Recognise when basic solutions work and when specialist involvement is needed

## Speaker

**Mr. Steve Kean**

Steve Kean has over 3 decades of experience in international financial planning and wealth management, with a background that includes strategic and transformation management consulting and establishing and expanding successful life insurance platforms with 2 leading international private banks. Steve has trained thousands of professionals in Europe and across Asia through workshops designed to simplify complex financial concepts. Passionate about empowering others with actionable knowledge, he is committed to elevating industry standards and positive client outcomes.