Manulife

Investor Day 2024

Presenter and panelist biographies

Roy Gori

President & CEO

Roy's tenure as CEO began in 2017 and has been marked by the introduction of a clear strategy and values that build on Manulife's strong foundations to include sharper focus on the customer and a shift to digital innovation, in line with the company's mission to make customers' decisions easier, and lives better. As a champion of diversity, equity and inclusion, Roy is the Chair of Manulife's DEI Council. He is also a passionate advocate for health and wellness, promoting the benefits of behavioral insurance through award-winning products like Manulife Vitality and Manulife MOVE.

Roy joined Manulife as President and Chief Executive Officer for Asia in 2015. In that role, he was responsible for operations in 12 markets across Asia, driving Manulife's rapidly growing business in the region.

Roy holds a Bachelor of Economics and Finance degree from The University of New South Wales, and an MBA from the University of Technology in Sydney.

Colin Simpson

CFO

In his role as the Chief Financial Officer (CFO) at Manulife, Colin is responsible for managing the company's global financial affairs, including finance, accounting, capital, treasury, taxation, investor relations and financial regulation.

Colin joined the firm in 2022 and served as CFO of John Hancock. He brought over 20 years of experience to his role, including his most recent role at Aviva, where he was the Interim Group CFO. Prior to that he served as CFO of Aviva's Canadian division and Aviva's Director of Investor Relations.

Colin is a Fellow of the Institute of Actuaries (FIA) and holds a Bachelor's degree in Statistics from the University of Cape Town.

Marc Costantini

Global Head of Strategy & Inforce Management

Marc is the Global Head of Strategy and Inforce Management, where he leads Corporate Strategy, Corporate Development and all initiatives to improve the profitability and risk profile of Manulife's Inforce business. He also has responsibility for Manulife's P&C reinsurance business.

Marc rejoined Manulife from Munich Re where he was President & CEO for Corporate Development, Strategy and Digital Solutions for the company's North America Life & Health business. Prior to his current role, he served as EVP, Commercial and Government Markets for Guardian, where he drove continued growth of the company's group employee benefits business after having initially been appointed as the company's CFO in 2014. As CFO he was responsible for all finance, accounting, tax, actuarial, risk, capital and treasury functions.

Having initially joined Manulife in 1990, Marc spent more than 23 years holding a variety of executive leadership roles in Corporate Strategy, Corporate Development, Finance, and the operating businesses.

Marc graduated from Concordia University with a Bachelor's of Science degree. He is a Fellow of the Society of Actuaries.

Paul Lorentz

President & CEO, Global Wealth & Asset Management

In this role, Paul has direct oversight over Manulife's Global Wealth and Asset Management business, including our retirement, retail and asset management solutions offered worldwide.

Prior to this role, Paul most recently served as General Manager of Individual Wealth Management and Insurance for the Canadian Division, overseeing Manulife Investments, Manulife Securities, Manulife Private Wealth, and Manulife Insurance. In this role, he was responsible for delivering industry-leading advice, investment, and insurance solutions to Canadians. Paul joined Manulife in 1993 and has held a variety of roles of increasing responsibility throughout our Canadian operations.

Paul is a Fellow of the Canadian Institute of Actuaries and he graduated from the University of Waterloo with a Bachelor's degree in Mathematics. He is also a graduate of the Queen's Leadership Program.

Michael Dommermuth

Head of Asia Wealth & Asset Management

Michael leads the Wealth and Asset Management business in Asia to address the region's large and growing wealth management market opportunity. In this capacity, Michael's responsibilities include setting the strategic direction for continued growth across the region's retail, institutional, and retirement businesses. He's also responsible for business development, regulatory and business risk management, client relationship management, and local operational efforts for the wealth and asset management franchise in Asia.

Prior to his current role, Michael was the firm's President of International Asset Management and, before that, he headed Manulife Financial's investment operations in Asia (ex-Hong Kong).

Earlier in his career, Michael led the firm's institutional spread-based business product development efforts from 2001 to 2004.

Michael holds a Bachelor's degree in Mathematics and Management Science from Carnegie-Mellon University.

Aimee DeCamillo

Head of Retirement, Global Wealth & Asset Management

Aimee is accountable for the strategy, growth, and overall financials of Manulife Investment Management's retirement business. She partners closely with her regional CEOs in the US, Canada, and Asia to ensure the strategy reflects the nuances of the local markets, while also focusing on global leverage, directing opportunities for collaboration and synergies across regions. Aimee also works closely with the Chief Investment Officers for Public and Private Markets to develop innovative investment products that create value for over 8 million retirement investors served.

Prior to joining Manulife Investment Management, Aimee was most recently at Jackson Financial, a NYSE-listed life insurance and annuity company, where she served as Chief Commercial Officer and a key member of the executive leadership team. Prior to that, Aimee was President of Retirement Plan Services for T. Rowe Price. She also spent several years in various leadership roles at Bank of America and Merrill Lynch.

Aimee holds a Bachelor's degree in International Relations from Michigan State University.

Phil Witherington

President & CEO, Manulife Asia

In his role, Phil is responsible for Manulife’s fast-growing Asia Segment, including businesses in Hong Kong and Macau, mainland China, Japan, Singapore, Vietnam, Indonesia, the Philippines, Malaysia, Cambodia, and Myanmar.

Prior to this role, Phil served for five years as Chief Financial Officer at Manulife. He was responsible for managing Manulife’s global financial affairs, and successfully led the implementation of IFRS 17 and IFRS 9. Phil joined Manulife in 2014 as Chief Financial Officer of Manulife Asia and served as its Interim President & Chief Executive Officer in 2017.

Prior to joining Manulife, Phil led finance in Asia Pacific for the Retail Banking and Wealth Management business at HSBC and earlier served as the Deputy Regional Chief Financial Officer for its Asian insurance businesses.

Phil is a Fellow of the Institute of Chartered Accountants in England & Wales (FCA) and the Hong Kong Institute of Certified Public Accountants (FCPA). He also holds an Executive MBA jointly awarded by the University of Edinburgh Management School in United Kingdom and the École Nationale des Ponts et Chaussées in France.

Jean Wong

CEO, Global High-Net-Worth

Jean is responsible for providing strategic leadership to Asia Segment's high-net-worth business focusing on life insurance solutions.

Prior to her current role, Jean led Manulife Bermuda's high-net-worth business, transforming the business from a niche insurance carrier to a globally diversified and resilient leader in the international high-net-worth market.

Jean brings a broad experience base that has spanned leadership roles in sales and distribution, product development, marketing, and finance, to her current role.

Jean received a Master's degree in Accounting from the University of Waterloo, Canada and earned her accreditations as a Chartered Accountant in Canada (Ontario) and as a Certified Public Accountant (CPA) in the United States.

Kah Siang Khoo

CEO, Singapore

Kah Siang is responsible for growing and strengthening the Manulife franchise in Singapore.

Prior to this role, Kah Siang held regional and in-market roles with Great Eastern Life and the Monetary Authority of Singapore. With over 25 years of experience in the financial services sector, he has assumed multiple industry positions, including President of the Life Insurance Association, Board member of the Singapore College of Insurance, and Member of MAS Financial Centre Advisory Panel.

Kah Siang was conferred the prestigious Distinguished Fellow by the Institute of Banking and Finance Singapore in 2015. He is currently the Chairperson of the inaugural Singapore Insurance Culture and Conduct Steering Committee, focusing on elevating standards of culture and conduct in the insurance industry.

Kah Siang is a Fellow of the Institute of Actuaries, in the United Kingdom, and holds a Doctorate in Statistics from the University of Kent, Canterbury, in the United Kingdom.

Venice Chan

Chief Strategy & Transformation Officer, Vietnam

Venice leads the strategy and transformation, customer experience and data analytics functions at Manulife Vietnam. She drives the delivery of the overall strategy mandate and implementation of business transformation and strategic initiatives. Additionally, she plays a pivotal leadership role in designing customer journeys, enhancing customer and user engagement, and delivering a best-in-class digital customer platform and experience.

Prior to her current role, Venice held positions in the Regional Strategy and Corporate Development team and served as the Chief of Staff to the General Manager of Emerging Markets. Her extensive experience includes working in MetLife Asia Regional Strategy and Ernst & Young Transaction Advisory Hong Kong.

Venice is a member of the Hong Kong Institute of Certified Public Accountants and holds a bachelor's degree in Business Administration in Accounting from the Hong Kong University of Science and Technology.

Sachin N. Shah

General Manager, Emerging Markets, Asia

In his role, Sachin is responsible for driving the development of Manulife's operations in Southeast Asia's emerging markets – namely Cambodia, Indonesia, Malaysia, Myanmar, and the Philippines. He is also Chairman of the Members Council (i.e., Board of Directors) for Manulife Vietnam, Chairman of the Board of Directors for Manulife Philippines, Manulife Singapore and Manulife Japan.

Sachin brings vast industry experience, principally in Asia and the United States. He joined Manulife from AIG, where he was CEO, Asia Pacific General Insurance. He previously held a variety of senior leadership roles across a 20-year tenure at MetLife, most recently as Chairman, President and CEO MetLife Japan. Sachin also served as President of the American Chamber of Commerce in Japan.

Sachin holds a Master of Science degree in Finance and Technology as well as a Bachelor's degree in Electrical, Electronics and Communications Engineering from Stevens Institute of Technology.

Patrick Graham

CEO, Hong Kong & Macau

In his role, Patrick oversees Manulife's business across Hong Kong and Macau. Patrick brings more than 25 years of leadership experience in the insurance and financial services industries to this role.

Prior to joining Manulife, Patrick worked with Cigna as their CEO – Asia Pacific and Head of Strategy, Analytics and Innovation – International Markets, where he covered a number of major markets spanning Hong Kong, Indonesia, Korea and Singapore in various senior leadership positions.

Before that, Patrick spent 14 years in various senior executive roles at GE Capital, the then financial services arm of General Electric, including as CEO of Tesco Card Services. He also served as Director and Treasurer of the US-ASEAN Business Council for almost three years.

Patrick holds a Bachelor of Arts degree from QMW College, University of London.

Calvin Chiu

Head of Asia Retirement, Asia Wealth & Asset Management

In his role, Calvin oversees the pension businesses in Hong Kong and Indonesia. He is also responsible for pension markets business development and expansion strategy across the region, as well as providing pension-related subject-matter expertise to each market in Asia.

Prior to his current role at Manulife, Calvin was responsible for executive compensation and compensation programs for Manulife's Investment Division. Calvin joined Manulife in September of 2010 as Vice President, Global Pensions and Benefits. In that role, he had oversight of all the pension and benefits plans for Manulife's employees, agents, and retirees globally. Prior to joining Manulife, Calvin was the Senior Director of Global Pensions at Canadian Imperial Bank of Commerce.

Calvin holds a Bachelor of Math in Actuarial Sciences degree from the University of Waterloo. He is a Fellow of the Society of Actuaries.

Karen Leggett

Chief Marketing Officer

In her role as the Chief Marketing Officer, Karen leads our marketing, innovation, digital, and analytics efforts globally. She oversees our customer experience transformation, partnering with Global Technology and Operations.

Prior to joining Manulife, Karen most recently served as a Global Client Partner at Ernst & Young in the firm's Financial Services Advisory practice. Before that, she was the Chief Marketing Officer at National Bank of Canada also leading Digital, Analytics, Innovation, and Corporate Development in emerging markets.

Karen holds an Executive MBA from Richard Ivey School of Business and a Bachelor of Commerce degree from Concordia University.

Jodie Wallis

Chief Analytics Officer

In her role as the Global Chief Analytics Officer at Manulife, Jodie leads the company’s efforts worldwide to leverage data and analytics to deliver personalized customer experiences, achieve process excellence across functional domains and support strategic decision making.

Prior to joining the company, Jodie was a Managing Director at Accenture where she led the Canadian Applied Intelligence Practice. In that role she was responsible for working with clients across industries to develop and implement data and analytics strategies and pushing the boundaries of applied machine intelligence models to deliver incremental value for Canadian organizations.

Jodie holds a Bachelor of Mathematics degree from the University of Waterloo.

Naveed Irshad

President & CEO, Manulife Canada

Naveed leads the implementation of the company's growth strategy across the Canadian market, where we're focused on helping Canadians improve their financial, physical, and mental health.

Prior to his current role, Naveed was Global Head of Inforce Management and Head of our North American Legacy Business, where he led initiatives to improve the profitability and risk profile of the inforce business. Naveed was also President & CEO of Manulife Singapore where he oversaw the overall development of Manulife's operations across all business segments and distribution platforms in Singapore.

Naveed is an avid supporter of Manulife's Diversity, Equity & Inclusion efforts and internal employee resource groups. In 2022, Naveed was appointed to the Government of Canada's Disability Inclusion Business Council – a select group of Canadian business leaders who provide the Minister of Employment, Workforce Development and Disability Inclusion advice and recommendations on workplace inclusivity.

Naveed is a Fellow of the Society of Actuaries (FSA) and of the Canadian Institute of Actuaries (FCIA) and is a Member of the American Academy of Actuaries (MAAA). He holds a Bachelor's degree in Actuarial Math from Concordia University.

Brooks Tingle

President & CEO, John Hancock

In this role, Brooks leads Manulife's US Segment, operating as John Hancock — one of the largest life insurers in the United States, supporting more than ten million Americans with a broad range of financial products, including life insurance and annuities.

Before taking on his current role in 2023, Brooks served as President and CEO of John Hancock Insurance. Notably, he led John Hancock to embrace and implement the company's now market-leading behavioral insurance solution — John Hancock Vitality — which offers life insurance customers significant savings and rewards for taking everyday steps towards a longer, healthier, better life.

Brooks serves as President and Chairman of the boards for John Hancock's insurance companies, including John Hancock Life Insurance Company (U.S.A.) and John Hancock Life Insurance Company of New York. He holds an MBA from Boston University and a Bachelor's degree in Economics from the University of New Hampshire.

Ryan Charland

President Director & CEO, Indonesia

Ryan brings more than 20 years of career experience in the insurance industry to his role. He started his career journey at Manulife in August 2003 and has worked for Manulife Financial in various leadership functions. His experiences have solidified his leadership and expertise in product development, finance, and corporate risk management.

Before leading Manulife Indonesia, Ryan was the President and CEO of Manulife Philippines for 5 years, where he successfully scaled up the Philippines's business to a new height.

Ryan holds a Bachelor's degree in Computer Science and Actuarial Science from the University of Toronto.

Afifa

President Director & CEO, Indonesia Wealth & Asset Management

Afifa has over 27 years of career experience in the Indonesian capital market industry. She joined MAMI in 2011 as the Head of Institutional Sales and went on to be the Director & Chief Distribution Officer responsible for all distribution channels. She was named CEO and President Director in February of 2021.

While leading MIM Indonesia, Afifa also serves as the Chairperson of the Indonesian Investment Managers Association (AMII). Her professional experience includes the Deputy Head of Equity Sales & Dealing at Bahana Securities and Head of Institutional Sales at DBS Vickers Indonesia.

Afifa has maintained an Investment Manager Representative license since 2001. She earned a Bachelor of Economics degree from Padjajaran University, and a Master of Management degree from Bina Nusantara University.

Hung Ko

Global Head, Investor Relations

In this role, Hung is responsible for leading the company's global investor relations program, overseeing the execution of our investor relations strategy and the preparation of investor communication materials, as well as providing strategic counsel to Manulife's senior management team.

Previously, Hung was the Global Head of Funding and Credit Relationship Management, and Treasurer of Manulife Bank. In that role, Hung raised over $20 billion of capital globally, managed over 20 corporate credit facilities, strategically enhanced the relationship with our credit rating agencies, and proactively leveraged bank partnerships to drive value. Prior to joining Manulife in 2012, Hung held the position of Vice President, Capital Management at Sun Life Financial.

Hung holds an MBA degree from McGill University and is a CFA charterholder, as well as a Certified Public Accountant (CPA).