AIA Hong Kong

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

AIA.COM.HK

Memo

Attn: All Agents (Hong Kong and Macau)

From: Miranda Leung
Head of Services & Operations

Co/Dept:

Dept: Services and Operations Department

Date: 18 September 2013

Total page: 1

Copy: All Department Heads

Subject: (Ref: A130952) **以退保利益繳付新保單首期按金**
Transfer Surrender Value to Pay Initial Deposit for New Application

為了令客戶擁有更靈活的財務安排，同時協助各營業顧問爭取更多新生意，由 2013 年 9 月 18 日起，在符合以下條件的情況下，客戶可以以退保之利益來繳付新保單之首期保費:

1. 「新保單」之核保營業顧問必需與「舊保單」的核保營業顧問或獲派發佣金的營業顧問相同;
2. 「新保單」之保單持有人必需與「舊保單」之保單持有人相同;
3. 保單持有人必需遞交最近三個月內的通訊地址證明文件副本,並連同退保申請書交到保戶服務部,而營業員核實文件聲明書並不適用。我們將郵寄所有確認文件及退款支票(如有)至保單持有人的通訊地址。如地址證明文件上的地址與保單記錄不相符,請同時遞交更改通訊地址申請表格;
4. 投保人必需填寫客户保障聲明書並連同投保申請書一併提交到核保部;
5. 「新保單」成功批核後，我們會致電客户來核實是次申請。

如有任何查詢，請致電營運部熱線(852)2232-8999（香港）或（853）8988-1833(澳門)或親臨位於友邦香港大樓、九龍 Manhattan Place或 Landmark East 友邦九龍大樓之營運服務中心查詢。

In order to allow more flexibility to our policyholders in their financial planning and assist our agents to strive for more new business, effective from September 18, 2013, company will accept policyowners to surrender their existing policy and transfer the surrender value to pay the initial premium of their new applications subject to the following conditions:

1. The agent of the “New Policy” must be the production agent or commissionable agent of the “Old Policy”;
2. The policyowner of the “New Policy” must be the same as the “Old Policy”;
3. Applicant is required to submit a copy of correspondence address proof issued within the last 3 months together with the surrender form to POS. ’Declaration Form of Document Verification by Agent’ (DVAGT) is not applicable. The surrender confirmation letter and refund cheque, if any, will be sent to the policyowner’s correspondence address directly. In case that the correspondence address on the address proof is different from our system record, please update it by submitting a Request Form for Change of Address.
4. Applicant is required to complete the Customer Protection Declaration and submit together with Insurance Application form to Underwriting Department.
5. Confirmation call is applied to all successful new applications with initial premium paid by surrender value.

Should you have any queries, please call our Operations Hotline at (852)2232-8999 (Hong Kong) or (853) 8988-1833 (Macau) or visit our Operations Service Centers in AIA Hong Kong Tower, Manhattan Place or AIA Kowloon Tower in Landmark East for details.

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Best regards,



Miranda Leung

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