AIA Hong Kong
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Memo

Attn: All EDD & Honorable Advisors/ EDDs / PSDDs / SDDs / DDs / MICs /Agency Leaders (Hong Kong Only)

From: Anita Chan / Stewart Lee

Copy: Mr. Jim Jan Zen / Ms. Manda Chan/ All Department Heads / All ABDD Executives /All BTDD Members

Dept: Business Training and Development Department/ Premier Agency

Date: 9 July 2018

Total page: 6

2018 全方位 銳精兵 勤奮進
Next-Gen Agency Expansion

Subject: (A180717) 刊登招募廣告四步曲
Four-Step of Posting Recruitment Advertisements

為協助各營業單位製作合規的招募廣告，以下準備了招募廣告四步曲，供大家於刊登線上或線下的招募廣告時參照。

第一步 • 判斷是否招募廣告

招募廣告	不屬招募廣告的例子
如廣告或貼文包含部份或全部以下內容，應視之為招募廣告： - 職位 - 職責描述 - 公司簡介 - 入職要求 - 福利待遇 - 聯系及遞交申請方式 - 呼籲對方提交履歷及作出申請	- 個人成功故事的分享 - 理財心得及分享 - 區域活動報告 - 區域介紹 上述例子雖然不視為招募廣告，但其內容仍需依從公司的政策及指引，包括但不限於： - 〈社群媒體政策與準則〉及 - 〈抵港抵澳內地人仕業務指引〉 如在文中呼籲對方聯絡發文者，以進一步了解財務策劃行業及/或團隊文化，請加入以下聲明： - "本文並非招募廣告，亦不構成任何邀請或招攬提交職位之申請。"

第二步 • 使用招募廣告範本

使用招募廣告範本	不使用招募廣告範本
招募財富管理助理經理、財務策劃顧問或副財務策劃顧問，可通過以下網址取得招募廣告範本： *營業員專頁 > 部門資訊 > 營業優才發展部 > 招募工具 > Prospecting > Recruitment Advertisement*	任何自行設計的招募廣告: **必須獲得營業拓展部的預先批核**才可刊登

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第三步 • 確保正確陳述下列各項資料

職位名稱	友邦財務策劃顧問及營業主管的官方職稱詳列在 AIA Agency Visual Identity，可通過以下網址取得： *營業員專頁 > 指南 > General Manuals > AIA HK Guideline > AIA Agency Visual Identity Guidelines > Appendix > Section 4*
公司及營業單位的名稱	根據個人資料（私隱）條例，禁止刊登任何"匿名"招聘廣告。完整的監管要求可參照該條例下的《人力資源管理實務守則》： *https://www.pcpd.org.hk/english/data_privacy_law/code_of_practices/code.html*
回覆資料	- 包括聯絡人及聯絡方法 - 清楚列明以下字眼：*"有興趣者請通過（電郵地址）遞交申請至—友邦授權代表—（XXX 區域/組別名稱）…"*
津貼	- 提及每月津貼，另加佣金及績效獎金 (如適用) - 不可提及"保證每月收入"、"預期每年收入 HK$X00,000"，有關陳述可能誤導有意的申請者
電郵地址	- 必須使用以"@aia.com.hk"為域名的公司電郵地址作爲通訊電郵 - 不可於招募廣告中使用非公司電郵地址作爲通訊電郵，例如不可用"@yahoo.com.hk"或"@gmail.com"等域名的電郵地址

第四步 • 內容用字要留心

需要包括以下完整字句於招募廣告中	切忌使用以下內容
✓ 所有收集的個人資料只會被用作招募之用及將會根據我們的資料私隱原則處理，你可向我們索取我們的資料私隱原則，我們在收到要求後，會隨即提供一份有關原則的複本。友邦保留更改待遇的條款及細則之權利。" ✓ "成功的應徵者將與友邦簽訂 Career Representative Contracts" ✓ "「友邦」及「AIA」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）"	× 過期、不符事實、誤導的數據及/或資料，例如："XXX 區域帶領您達成百萬圓桌資格之路" × 以"友邦"身份作出任何"保證"或"承諾" × 帶有歧視的字眼，包括但不只限於性別、殘障、年齡、種族、家庭崗位等 × 暗示有僱傭關係的用語，例如"強積金供款"、"僱用"、"招聘"、描述或暗示給予"薪金" × 任何被認為與跨境銷售有關的字眼，例如："開拓國內市場"或"在外地進行業務"

所有違規個案將呈交至Market Conduct Committee ("MCC")進行審理。如查明屬實，公司將對有關之財務策劃顧問及/或營業單位主管作出懲處，罰則由書面警告至扣3分不等，視乎違規嚴重程度而定。

陳翠珊
營業培訓及發展部主管

李誠凱
卓越顧問營業部主管

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为协助各营业单位制作合规的招募广告，以下准备了招募广告四步曲，供大家于刊登在线或线下的招募广告时参照。

第一步 • 判断是否招募广告

招募广告	不属招募广告的例子
如广告或贴文包含部份或全部以下内容，应视之为招募广告： - 职位 - 职责描述 - 公司简介 - 入职要求 - 福利待遇 - 联系及递交申请方式 - 呼吁对方提交履历及作出申请	- 个人成功故事的分享 - 理财心得及分享 - 区域活动报告 - 区域介绍 上述例子虽然不视为招募广告，但其内容仍需依从公司的政策及指引，包括但不限于： - 〈社群媒体政策与准则〉及 - 〈抵港抵澳内地人仕业务指引〉 如在文中呼吁对方联络发文者，以进一步了解财务策划行业及/或团队文化，请加入以下声明： - "本文并非招募广告，亦不构成任何邀请或招揽提交职位之申请。"

第二步 • 使用招募广告模板

使用招募广告模板	不使用招募广告模板
招募财富管理助理经理、财务策划顾问或副财务策划顾问，可通过以下网址取得招募广告范本： *营业员专页 > 部门信息 > 营业优才发展部 > 招募工具 > Prospecting > Recruitment Advertisement*	任何自行设计的招募广告: **必须获得营业拓展部的预先批核**才可刊登

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第三步 • 确保正确陈述下列各项资料

职位名称	友邦财务策划顾问及营业主管的官方职称详列在 AIA Agency Visual Identity，可通过以下网址取得： *营业员专页 > 指南 > General Manuals > AIA HK Guideline > AIA Agency Visual Identity Guidelines > Appendix > Section 4*
公司及营业单位的名称	根据个人资料（私隐）条例，禁止刊登任何"匿名"招聘广告。完整的监管要求可参照该条例下的《人力资源管理实务守则》： *https://www.pcpd.org.hk/english/data_privacy_law/code_of_practices/code.html*
回复资料	- 包括联络人及联络方法 - 清楚列明以下字眼：*"有兴趣者请通过（电邮地址）递交申请至—友邦授权代表—（XXX 区域/组别名称）…"*
津贴	- 提及每月津贴，另加佣金及绩效奖金(如适用) - 不可提及"保证每月收入"、"预期每年收入 HK$X00,000"，有关陈述可能误导有意的申请者
电邮地址	- 必须使用以"@aia.com.hk"为域名的公司电邮地址作为通讯电邮 - 不可于招募广告中使用非公司电邮地址作为通讯电邮，例如不可用"@yahoo.com.hk"或"@gmail.com"等域名的电邮地址

第四步 • 内容用字要留心

需要包括以下完整字句于招募广告中	**切忌使用以下内容**
✓ 所有收集的个人资料只会被用作招募之用及将会根据我们的数据私隐原则处理，你可向我们索取我们的资料私隐原则，我们在收到要求后，会随即提供一份有关原则的复本。友邦保留更改待遇的条款及细则之权利。" ✓ "成功的应征者将与友邦签订 Career Representative Contracts" ✓ "「友邦」及「AIA」是指友邦保险（国际）有限公司（于百慕大注册成立之有限公司）"	× 过期、不符事实、误导的数据及/或数据，例如："XXX 区域带领您达成百万圆桌资格之路" × 以"友邦"身份作出任何"保证"或"承诺" × 带有歧视的字眼，包括但不只限于性别、残障、年龄、种族、家庭岗位等 × 暗示有雇佣关系的用语，例如"强积金供款"、"雇用"、"招聘"、描述或暗示给予"薪金" × 任何被认为与跨境销售有关的字眼，例如："开拓国内市场"或"在外地进行业务"

所有违规个案将呈交至Market Conduct Committee ("MCC")进行审理。如查明属实，公司将对有关之财务策划顾问及/或营业单位主管作出惩处，罚则由书面警告至扣3分不等，视乎违规严重程度而定。

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To facilitate agencies to prepare proper recruitment advertisements, a four-step procedure for posting online or offline recruitment advertisements as follows:

Step 1 Determine whether it is a recruitment advertisement

Recruitment Advertisement	Examples that are not recruitment advertisements
Where the advertisement or the post contains some of or all of the following elements, it should be considered a recruitment advertisement: - Job title - Job description - Company description - Requirements - Benefits and compensations - Channel for enquiry and application submission - Call to action for submitting resume and application	- Personal success story - Sharing of financial planning concepts - Report of agency district activity - Introduction of agency district Whilst the above examples are not considered a recruitment advertisement, the content must be in line with the Company's policies and guidelines, including but not limited to: • Social Media Policy and Guidelines; and • MCV Operations Guidelines. Where the post aims to persuade a reader to contact the writer for further enquiry about the financial planning industry and/or the culture of the agency district, please include the following statement: :- "This post is not a recruitment advertisement and does not cause any invitation or attraction to submit a job application."

Step 2 Using the Recruitment Advertisement Templates

Using Recruitment Advertisement Templates	Not using the templates
Templates for Recruiting Management Associates, Wealth Management / Financial Planner / Associate Financial Planner can be obtained via below path: *eAC > Departments > Agency Talent Development > Recruitment Tools > Prospecting > Recruitment Advertisement*	Any self-designed recruitment advertisement: **Pre-approval must be obtained from Agency Business Development Department**

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Step 3 State clearly below items in the template:

Title of the Job	Official Titles of Agent and Agency Leader are listed in the AIA Agency Visual Identity in below path: *eAC > Manual > General Manuals > AIA HK Guideline > AIA Agency Visual Identity Guidelines > Appendix > Section 4*
Name of the Company and Agency Office	"Blind" recruitment advertisement is PROHIBITED per Personal Data (Privacy) Ordinance. For details of the regulatory requirement, please visit "Code of Practice on Human Resource Management" in below website: *https://www.pcpd.org.hk/english/data_privacy_law/code_of_practices/code.html*
Information of Replying Channel	- Include contact person and contact method - Clearly indicate below wordings: *"Interested candidates please submit application to XXX District / Agency name, Authorized Representative of AIA by (E-mail)…"*
Compensation	- Mention monthly allowance plus attractive commission and performance bonus (if applicable). - DO NOT mention "guaranteed monthly income", "an expected income of HK$X00,000 per annum", which may mislead the interested candidates.
E-mail Address	- Provide only the agency email address with the domain name of "@aia.com.hk" - DO NOT use non-corporate email addresses such as "@yahoo.com.hk" or "@gmail.com"

Step 4 Use of Wording in content

DO include below statements word by word	DO NOT include below wordings
✓ "*All personal data collected will be used for recruitment purpose only and will be treated in accordance with Personal Data Policy, which is available upon request. AIA reserves the right to modify the terms and conditions of package offered.*" ✓ "*Successful candidates will enter into Career Representative Contracts with AIA.*" ✓ "*'AIA' refers to AIA International Limited (Incorporated in Bermuda with limited liability).*"	× Outdated, non-factual, misleading information. e.g. XXX District is the Road to MDRT × Mentioning any "guarantees" or "promises" on behalf of AIA × Discriminative words including but not limited to Sex, Disability, Age, Race, Family Status, etc. × Terms implying an employment relationship. e.g. "contribution to MPF scheme", "employ", "hire", state or hint that "salary" will be offered etc × Any wordings that could be perceived as a connection of offshore solicitation activities, e.g. "Develop PRC market" or "Conduct business outside Hong Kong/Macau

Any case with violations of the above requirements will be escalated to MCC for deliberation. If found substantiated, respective agent(s) and/or leader(s) will be penalized ranging from written warning to 3-point deduction.

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