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Memo

Attn: 2022 A Force Members
From: Jim Jan Zen

Copy: Mr. Alger Fung
Macau CEO
All department Heads / ABDD Executives

Dept: Management Team

Date: 30 March 2022
Total page: 8 + Attachment

Subject: (A220347) 2022年「小龍會 MIB」競賽要求及項目 – [A動力成員]
"MIB" Overseas Convention Contest Requirements & Awards 2022 [A Force Member]

「小龍會 MIB」是特別為 A 動力成員而設的首個 AIA 海外會議。作為 A 動力新力軍，您務必裝備自己、奠定根基。成為一位全方位的財務策劃顧問，為您的客戶提供最專業以及適切的保障。

MIB 競賽期為 A 動力成員合約生效起計 9 個月。達相關競賽要求將可分別獲邀出席 2023 或 2024 年舉行之 MIB 開會議。以下為競賽項目一覽:

競賽對象	合約生效月份	競賽項目
A 動力成員	2022 年 1 月至 12 月	**基本業績要求:** (1) 100% 及 200%會員資格
		其他競賽項目: (2) 小龍精英大獎 (3) 小龍會主席 (4) 小龍之星獎 (5) AIA Vitality 健康程式獎項

「小龍會」正是您成功旅程重要的里程碑，亦是入職第一年努力及成功的印證。
約定您，在您的首個海外會議見！

Best Regards,

Jim Jan Zen
Chief Agency Officer
Agency Distribution
AIA Hong Kong & Macau
JJZ/AL/cc

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2022 年「小龍會 MIB」競賽要求及項目

海外會議目的地： 泰國曼谷 (4 日 3 夜)

競賽對象: 2022 年 1 月至 12 月合約生效之 A 動力成員
(不包括營業單位主管、重新加入 AIA 的財務策劃顧問及持有財務策劃實習生合約者)

競賽期:

- 2022 年 A 動力成員合約生效日期、競賽期代號及競賽期詳情如下:

競賽期代號	合約生效月份	競賽期 (9 個月)	出席之 MIB 屆別
MIB26-06	2022 年 1 月	2022 年 1 月至 9 月	MIB 26 (暫定於 2023 年第 3 季舉行)
MIB26-07	2022 年 2 月	2022 年 2 月至 10 月	
MIB26-08	2022 年 3 月	2022 年 3 月至 11 月	
MIB26-09	2022 年 4 月	2022 年 4 月至 12 月	
MIB26-10	2022 年 5 月	2022 年 5 月至 2023 年 1 月	
MIB26-11	2022 年 6 月	2022 年 6 月至 2023 年 2 月	
MIB26-12	2022 年 7 月	2022 年 7 月至 2023 年 3 月	
MIB27-01	2022 年 8 月	2022 年 8 月至 2023 年 4 月	MIB 27 (暫定於 2024 年第 3 季舉行)
MIB27-02	2022 年 9 月	2022 年 9 月至 2023 年 5 月	
MIB27-03	2022 年 10 月	2022 年 10 月至 2023 年 6 月	
MIB27-04	2022 年 11 月	2022 年 11 月至 2023 年 7 月	
MIB27-05	2022 年 12 月	2022 年 12 月至 2023 年 8 月	

*合約生效日期為 2021 年 8 月至 12 月 (競賽期代號: MIB26-01 to MIB26-05)，請參閱通告 A210409-MIB 25

(A) 基本業績要求

小龍會 100% 及 200%會員資格:

- 完成基本業績要求成為 100%或 200%會員將獲邀出席「小龍會 MIB」海外會議。

會員級別	總 FYC C&A (港幣)	保單數目 或 客戶數目		意外及醫療保險及保障主導產品 FYC 最低要求 (港幣)	全保理財分析報告
100%	230,000	30	20	23,000	18
200%	460,000	15	10	46,000	豁免

基本業績競賽獎賞:

會員級別	獎賞
100%	• 來回泰國團體經濟客位機票 1 張, 及 • 雙人房佔半房(4 日 3 夜)
200%	• 可邀請嘉賓 1 位, 及 • 來回泰國團體經濟客位 2 張, 及 • 雙人房連同嘉賓各佔半房 (4 日 3 夜)

註:會員及同行合資格嘉賓需繳付香港/澳門及會議目的地有關之機場稅及保安稅。所需之總數及所有額外費用將會於旅程後從會員的公司出糧戶口內扣除。如遇特殊情況，公司或會以其他獎賞作替代。

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(B) 特別競賽項目

競賽條件：

- 競賽期內(MIB26-01 至 MIB26-12; MIB27-01 至 MIB27-12)，完成 100%或 200%會員資格，可角逐以下其他競賽項目

競賽項目	競賽對象/資格	業績要求
(1) 小龍精英大獎	完成 MIB 100%或以上會員級別要求	每期首名以最高 FYCB 排名之 A 動力成員(共 12 位) 將成為「小龍精英」
(2) 小龍會主席	「小龍精英大獎」得獎者	最高 FYCB 排名及確定出席所屬屆別 MIB 之「小龍精英」將成為「小龍會主席」
(3) 小龍之星獎	獲得「新星獎」之 A 動力成員*	• 36 張保單**或 20 個客戶; 及 • 4 個保險牌照; 及 • 18 份全保理財分析報告
(4) AIA Vitality 健康程式獎項	完成 MIB 100%或以上會員級別要求並必須於競賽期內為「AIA Vitality 健康程式」會員	• 於競賽期內成功與客戶生效 20 個新「AIA Vitality 健康程式」會籍; 及 • 個人「AIA Vitality 健康程式」會籍年度達金級或按比例之金級會員 (金級會員須於會籍年度達到 20,000「AIA Vitality 健康程式」積分,詳情請參閱 aia.com.hk/aiavitality)

*有關「新星獎」的業績要求，請參閱會籍及獎賞手冊。如屬 Industry LOU Package 的新晉財務策劃顧問 (包括但不限於 STAR PLUS, BANK LOU 並以公司的最新規定為準) 將不獲資格參與新星獎。

**當中需包括 1 張投資壽險保單及 1 張 CS-團體保險保單，或 1 張 CS-退休金企業業務保單，或 3 張 CS-退休金個人業務保單。

特別競賽獎賞：

競賽項目	獎賞
(1) 小龍精英大獎	• 於會議日參與進場儀式及嘉許，及 • 安排入住單人房，及 • 會員及其 1 位嘉賓(如適用) 獲邀與公司管理層於大會目的地出席慶祝午宴 • 若會員直屬主管獲得出席資格，直屬主管亦可獲邀出席慶祝午宴
(2) 小龍會主席	• 主持小龍會議之開幕儀式，及 • 來回目的地機場至酒店專車接送服務
(3) 小龍之星獎	• 於會議中獲得嘉許，及 • 安排入住單人房，及 • 額外一份酒店早餐
(4) AIA Vitality 健康程式獎項	• 泰式按摩禮遇價值港幣 500 元或同等價值獎賞

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一般規則:

1. A 動力成員及「小龍會 MIB」競賽資格如下:
   - 2022 年海外會議「小龍會 MIB」A 動力成員競賽項目只限在 2022 年 1 月至 12 月合約生效的 A 動力成員參與。不包括營業單位主管、重新加入 AIA 的財務策劃顧問及持有財務策劃實習生合約者。
   - A 動力成員必須出席核心培訓課程並達到 80%或以上之出席率方可競逐獎項。
   - 如屬 Industry LOU Package 的新晉財務策劃顧問 (包括但不限於 STAR PLUS, BANK LOU 並以公司的最新規定為準) 將不獲資格參與新星獎。
2. 於競賽期代號 MIB26-06 至 MIB26-12 之合資格出席者將獲邀出席 MIB26；而於競賽期代號 MIB27-01 至 MIB27-05 之合資格出席者將獲邀出席 MIB26。
3. 所有人壽保險、意外及醫療附加契約、意外及醫療獨立保單、人身意外保險、個人財物保險計劃、CS-團體保險業務、CS-退休金企業業務及 CS-退休金個人業務均計算於 FYC C&A 之內。
4. 意外及醫療保險(A&H)生意包括意外及醫療附加契約、意外及醫療獨立保單以及人身意外保險。
5. FYC 最低要求計算包括意外及醫療保險(A&H)及保障主導產品(PPP)FYC。有關保障主導產品(PPP)名單，請參閱附件。
6. 保單數目要求計算如下:
   - 1 張人壽保險保單
   - 附有 1 張或以上意外及醫療保險 (A&H) 附加契約的 1 張新人壽保單，將以 2 張保單計算
   - 1 張獨立個人意外保險保單 (IPA)
   - 1 張人身意外保險保單 (PAC)
   - 1 張個人財物保險保單
   - 1 張 CS-團體保險業務，包括套裝計劃、度身訂造計劃、「意安心升級保障」 - 友邦特選成員版或「友心意」醫療保障計劃 (Laughing 自選牙科保障計劃及澳門摯開心自選牙科保障計劃除外)
   - 1 張 CS-退休金企業業務保單，包括公積金(ORSO)、澳門退休金計劃及強積金僱主退 休計劃
   - 3 張 CS-退休金個人業務保單, 包括自僱人士退休計劃、強積金個人賬戶、尊享強積金個人賬戶、
   - 強積金可扣稅自願性供款計劃、澳門私人退休金計劃及公積金個人計劃(於同一年度同一身份客戶將以一個計算)，將以 1 張保單計算
7. 客戶 = 凡為新/現有受保人完成 1 張成功批核之人壽、個人意外保險保單、「意安心升級保障」 - 友邦特選成員版或「友心意」醫療保障計劃，即可成就 1 位客戶。於競賽期內重覆銷售予同一受保人，亦只計算為成就 1 位客戶。
8. 現有客戶，新客戶或準客戶之全保理財分析報告可計算於競賽業績內。iFHC 報告必須透過電郵發送至客戶或準客戶才獲計算。 於競賽期內重複建立 iFHC 報告予同一客戶或準客戶，將以一份報告計算。

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9. 「小龍精英大獎」、「小龍會主席」及「小龍之星大獎」將以 FYCB 計算；而會員資格及獎賞將沿用 FYC C&A 計算。
10. 若兩位財務策劃顧問共同遞交同 1 張保單或成就同 1 名客戶或同 1 個「AIA Vitality 健康程式」會藉，將以 0.5 單位計算予各人。
11. A 動力新星獎之競賽規則，以公司會籍及獎賞手冊為準。
12. 競賽結果以保單冷靜期後作調整為準。
13. 會議出席資格不得轉讓。A 動力成員及營業單位主管必需於會議舉行期間仍與公司持有效合約, 方能出席會議並取得有關獎賞。
14. 公司保留隨時修改競賽規則及嘉許之權利，恕不另行通知。
15. 如遇特殊情況，公司或會以其他獎賞作替代。
16. 如有任何異議，以 AIA 最後決定為準。

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"MIB" Overseas Convention Contest Requirements & Awards 2022

Destination: Bangkok, Thailand (4 Days 3 Nights)
Eligibility: A Force members contracted from January to December 2022
(Agency Leader, re-joined financial planners and those with internship contract are excluded)
Production Requirements:

- Respective A Force members contract date, contest period code and contest period listed as below:

Contest Period Code	Contract Date	Contest Period (9 Months)	MIB Convention to be Attended
MIB26-06	Jan 2022	Jan – Sep 2022	MIB 26 (Tentatively to be held during 3Q 2023)
MIB26-07	Feb 2022	Feb – Oct 2022	
MIB26-08	Mar 2022	Mar – Nov 2022	
MIB26-09	Apr 2022	Apr – Dec 2022	
MIB26-10	May 2022	May 2021 – Jan 2023	
MIB26-11	Jun 2022	Jun 2021 – Feb 2023	
MIB26-12	Jul 2022	Jul 2021 – Mar 2023	
MIB27-01	Aug 2022	Aug 2021 – Apr 2023	MIB 27 (Tentatively to be held during 3Q 2024)
MIB27-02	Sep 2022	Sep 2021 – May 2023	
MIB27-03	Oct 2022	Oct 2021 – Jun 2023	
MIB27-04	Nov 2022	Nov 2021 – Jul 2023	
MIB27-05	Dec 2022	Dec 2021 – Aug 2023	

*For A Force members contracted between August to December 2021 (Contest Period Code: MIB26-01 to MIB26-05), please refer to memo A210409 - MIB25.

(A) Basic Requirements

MIB 100% & 200% Membership Qualification:

- A Force members who fulfill the production requirement will be invited to join the MIB overseas convention.

Membership Level	Total FYC C&A (HK$)	Case Count	OR	No. of Customer	A&H & Prime Protection Products FYC (HK$)	iFHC Report
100%	230,000	30		20	23,000	18
200%	460,000	15		10	46,000	Waived

Prizes & Recognition:

Membership Level	Prizes & Recognition
100%	• Round-trip Group Air Ticket to Thailand Economy Class x 1, and • Twin Sharing Hotel Accommodation (4 Days 3 Nights)
200%	• 1 Guest Allowed, and • Round-trip Group Air Ticket to Thailand Economy Class x 2, and • Twin Sharing Hotel Accommodation with Guest (4 Days 3 Nights)

Remarks: The expenses of Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination will be borne by qualifiers and their respective guests (if any). The mentioned cost and all extra expenses will be debited from qualifiers' company payroll account after the trip. Please note that AIA reserves the right to offer alternative prize arrangement.

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(B) Special Awards

Production Requirements:

- Within Contest Period (MIB26-01 to MIB26-12; MIB27-01 to MIB27-12), A Force members who fulfil 100% or 200% membership qualification will be eligible to run for the below awards.

Awards	Eligibility	Production Requirements
(1) Top of the Class Award	MIB 100% or above membership qualifiers	The highest total FYCB ranked in each contest period code (i.e. Total 12 "Top of the Class" qualifiers)
(2) MIB President	"Top of the Class Award" Qualifiers	The highest total FYCB ranked among the 12 "Top of the Class" qualifiers and finally attends the MIB convention will be named as the "MIB President"
(3) MIB Star Award	A Force "First Challenge Award" Qualifiers*	• 36 Cases** or 20 Customers, and • 4 Insurance Licenses, and • 18 iFHC Reports
(4) AIA Vitality Award	MIB 100% or above membership qualifiers with inforce AIA Vitality member within contest period	• Achieve a min. of 20 New AIA Vitality Memberships within contest period, and • The MIB qualifier should achieve pro-rata AIA Vitality Gold status within respective membership year (Gold status refers to members who achieved at least 20,000 AIA Vitality points within the membership year, details can be referred to aia.com.hk/aiavitality)

* For "First Challenge Award" requirements, please refer to C&A Manual. New financial planners with Industry LOU Package (including, but not limit to STAR PLUS, BANK LOU and subject to the latest definition by the Company) are not qualified for the First Challenge Award.
** Include 1 Investment Linked Case; and 1 CS-EB Case OR 1 CS-Pension Corporate Case OR 3 CS-Pension Retail Cases

Prizes & Recognition:

Awards	Prizes & Recognition
(1) Top of the Class Award	• Being recognized and invited to join the march-in ceremony on Convention Day, and • Single room accommodation during the trip, and • Qualifiers and their guests (if applicable) will be invited to join the MIB Celebration Luncheon with top management at the destination • If respective Direct Leaders are eligible to attend the convention, they will also be invited to join the Celebration Luncheon
(2) MIB President	• To officiate the opening of the MIB Convention Meeting; and • 2-way limousine transfer from airport to hotel at the destination
(3) MIB Star Award	• Being recognized on Convention Day; and • Single room accommodation during the trip; and • 1 extra hotel breakfast during the trip
(4) AIA Vitality Award	• Thai massage experience valued at HK$500 (or alternative arrangements with equivalent value)

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General Rules:

1. A Force members & MIB convention contest eligibility refer to:
   - Only A Force members contracted from January to December 2022 are eligible to participate in the 2022 MIB overseas convention contest - A Force category. Agency leaders, Re-joined financial planners and those with internship contract are excluded.
   - All A Force members must have attended Core training course with attendance rate of 80% or above.
   - New financial planners with Industry LOU Package (including, but not limit to, STAR PLUS, BANK LOU and subject to the latest definition by the Company) are not qualified for the First Challenge Award.
2. Eligible qualifiers within contest period MIB26-06 to MIB26-12 will be invited to attend the MIB26 convention; eligible qualifiers within contest period MIB27-01 to MIB27-05 will be invited to attend the MIB27 convention.
3. FYC C&A on all Life, Life A&H Riders, Standalone Life A&H, PA, Personal Lines, CS-EB, CS-Pension Corporate and CS-Pension Retail will be counted.
4. A&H business includes A&H Riders, Standalone and PA business.
5. Min. FYC production requirement including A&H and Prime Protection Products (PPP) FYC. For PPP products list, please refer to appendix.
6. Case count calculation including the followings:
   - 1 Life case
   - 1 new Life case with 1 or more A&H Riders will be counted as 2 cases
   - 1 IPA case
   - 1 PAC case
   - 1 Personal Lines case
   - 1 CS-EB case, including package, tailor-made plan, Secure First Plus – AIA Selected Member version and Step Up (excluding Laughing Voluntary Dental Care Plan & Cheers Macau Dental Plan), OR
   - 1 CS–Pension Corporate Cases, including ORSO, Macau Corporate Pension Schemes and MPF Employer Pension Scheme
   - 3 CS–Pension Retail Cases include Self-Employed Person (SEP) Schemes, MPF Personal Account (MPFPA), Preferential MPF Personal Account, MPF Tax Deductible Voluntary Contribution Scheme (TVC), Macau PPF Personal Account and Macau Individual Provident Fund Scheme (based on unique ID in the same sales year) will be counted as 1 case
7. Customer = 1 approved Life, PA Policy, Secure First Plus – AIA Selected Member Version or StepUp Medical Protection Plan during the contest period from new/existing insured is equivalent to 1 Lives saved. Repeated sales to the same insured during the qualifying period are considered as 1 Lives saved.
8. The iFHC report of existing customers, new customers and prospect will be counted to the production requirement. Only iFHC reports sent to customer or prospect customer via email will be counted. iFHC reports generated underthe same customer within the contest period will be counted as one report.
9. FYCB is used for counting for all top ranking awards, while FYC C&A is used for counting qualification & benefit.
10. Joint case count or customer count or AIA Vitality membership count will be counted as 0.5 for each financial planner.
11. Detailed qualifying rules of "1st Challenge Award" will follow Clubs & Awards Manual.
12. Cooling-off policies are excluded.
13. All privileges and awards of related Convention are not transferable and are restricted to Financial Planners or Agency leaders who hold valid contracts with the Company at the time of Convention.
14. AIA reserves the right to amend any of the rules and recognition arrangement of this contest (program) at any time without prior notice.
15. AIA reserves the right to offer alternative prize arrangement.
16. In the event of any dispute, AIA's decision is final.

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附件 Appendix – 特選保障主導產品及附加契約 Prime Protection Products (PPP)

保障主導產品 (核心)	Prime Protection Products (Core)
• 所有AIA自願醫保計劃 (VHIS) (包括尊裕、尊顯、尊尚、靈活、標準計劃) – 只限香港 • 「尊裕明珠」醫療計劃 • 「尊顯明珠」醫療附加契約 • 「尊裕」醫療計劃 – 只限澳門 • 「尊顯」醫療附加契約 – 只限澳門 • 「至尊醫療計劃 5」系列 • 「亞洲至尊」醫療計劃 2 系列 • 特級「健康之寶」醫療保障計劃 2 系列 • 「癌症全方位保障 2」系列 • 「您想」投資連繫壽險計劃 (不包括額外投資部份) • 「自選人身意外保險 2」 • 摯誠定期壽險計劃系列 • 尊誠定期壽險計劃系列 • 「進添」計劃 - 癌症保障 • 「永無憂」住院及手術賠償附加契約(80 系列) - 只限澳門 • 「倍無憂」醫療保障計劃(80 系列) - 只限澳門 • 「銀意保」 • 「添意保」 • 簡護危疾保 • 「嚴重疾病醫療保障附加契約」系列 • AIA唯一摯保 - 癌症及嚴重傳染病保障系列 • AIA 唯一摯保 - 全面保障系列 • 全程守護健康保	• All AIA Voluntary Health Insurance Schemes (including Privilege Plus, Privilege, Prime, Flexi & Standard Scheme) – Hong Kong only • Privilege Plus Pearl Medical Plan (PPP) • Privilege Pearl Medical Rider (PPR) • Privilege Plus Medical Plan (PP) – Macau only • Privilege Medical Rider (PR) – Macau only • CEO5 series • CEO Essence 2 series • Super Good Health 2 series • Cancer Guardian 2 series • U-Select (Top-up Investment is excluded) • PAC Select 2 • Wisdom Term Life Plan Series • Expert Term Life Plan Series • Level-Up Protect Cancer Plan (LUP) • Hospital and Surgical Rider (HS) 80 – Macau only • Individual Medical Plan (IMP) 80 – Macau only • Silvery Protect • Xtra Protect • Simple Care Essence • Severe Illness Medical Protection Rider Series • "AIA One Absolute – Cancer & Serious Infectious Disease Protection" series • "AIA One Absolute - Full Protection" series • Health Journey Guardian

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保障主導產品 (其他)	Prime Protection Products (Others)
• 「都市三保」醫療危疾保障計劃系列 • 「友心意」醫療保障計劃 • 「樂無憂」住院惠益附加契約 • 「守康易定期壽險計劃」 • 「守康易危疾保」 • 「靈活住院惠益保障計劃」 • 「豐逸行」 • 「盛年意家保」 • 「豐年意家保」 • 意外死亡賠償附加契約 • 意外死亡及斷肢附加契約 • 簡易意外死亡及斷肢附加契約 • 「全意保」綜合意外保險附加契約 • 危疾附加契約 • 特選危疾附加契約 • 智護癌症保 • 進升危疾保障計劃 • 進泰附加契約 • 自悠附加「進泰安心保」(基本計劃) (只適用於「您想」投資連繫壽險計劃的附加契約) • 自悠附加「進泰安心保」(定期壽險) (只適用於「您想」投資連繫壽險計劃的附加契約) • 危疾附加契約(定期壽險) (只適用於「您想」投資連繫壽險計劃的附加契約) • 免付保費附加契約 • 付款人保障附加契約 • 特級危疾豁免繳付保費附加契約 • 特級付款人保障連危疾附加契約 • 特級預支保額及免付保費附加契約 • 未來保障權益附加契約	• Metro Trio Medical & Critical Illness Protection Plan Series • StepUp Medical Protection Plan • Hospital Benefit Rider (HB) • EasyGuard Term Life Plan • EasyGuard Care Essence • Flexi-MediGuard • Grand VIP • Super Adults Shield (SAS) • Super Seniors Shield (SSS) • Accidental Death Benefit Rider • Accidental Death & Dismemberment Rider • Simplified Accidental Death & Dismemberment Rider • Accident Indemnity Rider • Critical Illness Rider Pro (CI Rider Pro) • Enhanced Critical Illness Rider Pro (ECIR Pro) • Cancer Care Essence • Super HealthGuard Pro • Prime Care Rider • Cheerful Prime Care Pro On Basic (Rider attached to U-Select Only) • Cheerful Prime Care Pro On Term (Rider attached to U-Select Only) • Critical Illness Pro On Term (Rider attached to U-Select Only) • Waiver of Premium Rider (WP Rider) • Payor Benefit (PB Rider) • Critical Illness Waiver of Premium Rider Pro (WPCI Rider Pro) • Critical Illness Payor Benefit Rider Pro (PBCI Rider Pro) • Enhanced Advance Payment and Waiver of Premium Rider • Future Protection Rider

備註 Remarks：

- 包括「AIA 健康系列」之基本計劃及明珠版之基本計劃(如適用) Basic plans of "AIA Vitality Series" & Pearl Series are included (if applicable)
- 更新截至 2022 年 2 月 1 日 Updated as of 1 February 2022

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