AIA Hong Kong
1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

Attn: All Agency Leaders & Financial Planners via EDDs & Honourable Advisors/EDDs/SDDs/DDs/MICs

From: Jim Jan Zen

Copy: Mr. Alger Fung/
Mr. Louie Ho/
All Department Heads/ ABDD Executives

Dept: Management Team

Date: 22 August 2023

Total page: 8

Subject: **(A230824) [更新] 第 23 屆巨龍會 – 大阪之旅 [財務策劃顧問適用]**
[Update] The 23rd Dragons' Meeting – Osaka [for Financial Planner]

第 23 屆巨龍會將再訪日本，於關西大阪舉行！大阪是一個充滿活力、融合了現代與傳統魅力的國際大都會。恰如活力充沛的您，成為巨龍會會員即有機會起程前往大阪，享受巨龍會非凡體驗和榮譽嘉許，同時盡享當地豐富多樣的料理，感受悠久的歷史文化，探索最新潮流！

競賽期為 2023 年 7 月至 2024 年 6 月，今屆更新增計算藍十字業績，讓您快一步達成會員，一齊出發！

以下為「第 23 屆巨龍會 – 大阪之旅」競賽項目一覽：

競賽級別	競賽項目	獲取資格方法
個人業績競賽	(1) 100%至 800%會員資格 (2) 巨龍會主席 (3) 保單/客戶數目超級獎賞	以個人業績計算

Jim Jan Zen
Chief Agency Officer
Agency Distribution
Hong Kong and Macau
JJZ/AL/CC/CW/KT

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]

AIA Hong Kong
1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333
AIA.COM.HK

健康長久好生活

Memo

第 23 屆巨龍會 – 大阪之旅

海外會議目的地 : 日本大阪 (4 日 3 夜)
競賽日期 : 2023 年 7 月至 2024 年 6 月 (共 12 個月)
營業額指標 : 請參閱以下詳情

個人業績 – 基本競賽要求及獎賞

競賽對象：

- 與 AIA 持有效合約之所有財務策劃顧問及營業單位主管，完成個人業績基本要求之會員將獲邀出席「第 23 屆巨龍會」海外會議
- 營業單位主管可以其個人業績取得財務策劃顧問出席資格，並可豁免於「財務策劃顧問 - 個人業績」中列出的保單或客戶數目要求。若營業單位主管同時達到個人及組別業績要求，可獲冠以較高榮譽出席、計算津貼及獲取獎項

<table>
<tr><th>會員級別</th><th>總 FYC C&A (港幣)#</th><th colspan="2">保單數目 或 客戶數目</th><th>意外及醫療保險及
核心關鍵產品 FYC (港幣)</th><th>個人壽險
續保率</th></tr>
<tr><td>100%</td><td>515,000</td><td>75</td><td>50</td><td rowspan="2">51,500</td><td rowspan="8">80%</td></tr>
<tr><td>200%</td><td>1,030,000</td><td>38</td><td>25</td></tr>
<tr><td>300%</td><td>1,545,000</td><td colspan="2" rowspan="6">豁免</td><td rowspan="6">豁免</td></tr>
<tr><td>400%</td><td>2,060,000</td></tr>
<tr><td>500%</td><td>2,575,000</td></tr>
<tr><td>600%</td><td>3,090,000</td></tr>
<tr><td>700%</td><td>3,605,000</td></tr>
<tr><td>800%</td><td>4,120,000 或以上</td></tr>
</table>

獎賞:

<table>
<tr><th>會員</th><th>可邀請嘉賓</th><th>來回團體機票</th><th>住宿安排 (4 日 3 夜)</th><th>現金津貼(只限會員)</th></tr>
<tr><td>100%</td><td rowspan="2">不適用</td><td rowspan="2">經濟客位 1 張</td><td rowspan="6">雙人房
(每位合資格出席人士佔半房)</td><td>不適用</td></tr>
<tr><td>200%</td><td>HK$2,000</td></tr>
<tr><td>300%</td><td rowspan="5">1 位</td><td rowspan="5">經濟客位 2 張</td><td>不適用</td></tr>
<tr><td>400%</td><td>HK$2,000</td></tr>
<tr><td>500%</td><td>HK$4,000</td></tr>
<tr><td>600%</td><td>HK$6,000</td></tr>
<tr><td>700%</td><td>HK$8,000</td></tr>
<tr><td>800%</td><td>2 位</td><td>經濟客位 3 張</td><td>會員可獲安排入住單人房
而獲邀之 2 位嘉賓將獲安排入住雙人房</td><td>不適用</td></tr>
</table>

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]

AIA Hong Kong
1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333
AIA.COM.HK

健康長久好生活

Memo

備註:

- # 不論任何會員級別，總 FYC C&A 可包含藍十字佣金，以個人業績 100%會員級別計算的 10%為上限。（即最高港幣 51,500 元藍十字佣金）*(新增)*
- 一般保險業務包括所有經藍十字繕發的一般保險保單，涵蓋旅遊保險、個人保險及商業保險。
- 一般保險業務包括於競賽期內遞交（包括首尾兩天）並必須經藍十字（亞太）保險有限公司（「藍十字」）核實及須於 2024 年 6 月 30 日或之前入賬。
- 嘉賓之邀請及現金津貼只限出席「第 23 屆巨龍會」之會員。
- 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。

個人業績 – 特別競賽項目及獎賞

競賽對象：完成上述基本競賽要求之財務策劃顧問可競逐以下特別競賽。

獎項	競賽資格	業績要求	額外獎賞
巨龍會主席	以個人業績完成 100%會員級別或以上之財務策劃顧問(如財務策劃顧問在 2023 年 7 月 1 日之後獲晉升為營業單位主管，他/她只可以財務策劃顧問身份角逐此獎項)。	1) 完成意外及醫療保險及核心關鍵產品 FYC 港幣 51,500 元及個人壽險續保率 80%，及 2)最高 FYCB 排名，及 3)確定出席「第 23 屆巨龍會」將成為「巨龍會主席」	• 主持會議之開幕儀式 • 來回目的地機場至酒店專車接送服務 • 安排入住單人房 • 來回海外會議目的地商務客位機票 1 位
保單/客戶數目超級獎賞	完成 200%會員級別或以上	完成 100%會員級別之保單數目或客戶數目要求	現金獎港幣 1,000 元，每位得獎者只可獲取現金獎賞一次。

更新

備註：「巨龍會主席」將以 FYCB 計算；而會員資格及獎賞將沿用 FYC C&A 計算。特別計算之業績(如適用)將不會計算於巨龍會主席獎項。

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]

AIA Hong Kong
1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333
AIA.COM.HK

健康長久好生活

Memo

一般規則:

1. 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。
2. 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、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 Benefit 之內。
3. 意外及醫療保險生意(A&H)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。
4. FYC 最低要求計算包括意外及醫療保險 (A&H) 及核心關鍵產品 (KFP) FYC，有關核心關鍵產品(KFP)名單，請參閱附件。
5. 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 2 (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
6. 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 2，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。
7. 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，將以 0.5 單位計算予各人。
8. FYCB 只用作巨龍會主席資格之計算，會員資格沿用 FYC C&A 之計算並不受影響。
9. 營業單位主管及財務策劃顧問之個人壽險續保率將以"LIMRA 19-month"公式計算 (以每年保費為依據)，並根據 2024 年 6 月 30 日之 EB 續保率業績報告為準。2023 年 12 月 31 日後獲委任的新晉資深分區經理則需依照其個人業績計算續保率。
10. 競賽結果以保單冷靜期後作調整為準。
11. 會議出席資格不得轉讓。財務策劃顧問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。
12. 公司保留隨時修改競賽規則及嘉許之權利，恕不另行通知。
13. 如有任何異議，以 AIA 最後決定為準。

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]

AIA Hong Kong
1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333
AIA.COM.HK

健康長久好生活

Memo

The 23rd Dragons' Meeting – Osaka

Destination : Osaka, Japan (4D3N)
Qualifying Period : July 2023 – June 2024 (12 months)
Production Requirements : Please see below

By Personal Production - Basic Requirement & Awards
Eligibility:

- Financial planner / Agency leader who hold valid contracts with AIA. Qualifier achieved basic requirement will be invited to the 23rd Dragons' Meeting.
- Agency leaders can also qualify by his/her personal production and the case or customer requirement under "Financial Planner – by personal production" will be waived. If an agency leader qualifies by both personal production and agency production, he / she will be awarded and honoured according to the higher category.

Category	Total FYC C&A (HK$)#	OR		Min. A&H & Key Focus Products (KFP) FYC (HK$)	Life Persistency
		Case count	No. of Customer		
100%	515,000	75	50	51,500	80%
200%	1,030,000	38	25		
300%	1,545,000	Waive		Waive	
400%	2,060,000				
500%	2,575,000				
600%	3,090,000				
700%	3,605,000				
800%	4,120,000 or above				

Awards:

Qualifier	Guest Observer	Round-Trip Group Air Ticket	Hotel Accommodation (4-day/3-night)	Cash Allowance (For qualifier only)
100%	N/A	Economy Class x 1	Twin Sharing (Sharing room of each qualifier)	N/A
200%				HK$2,000
300%	1	Economy Class x 2		N/A
400%				HK$2,000
500%				HK$4,000
600%				HK$6,000
700%				HK$8,000
800%	2	Economy Class x 3	Single room for Qualifier and Twin sharing for Guest observers	N/A

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]

AIA Hong Kong
1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

Remarks:

- #Regardless of qualifier category, the total FYC C&A can include the amount of Blue Cross commission up to 10% of 100% Personal Production level (i.e. up to HK$51,500). *(New)*
- General Insurance Business defines as all general insurance policies issued by Blue Cross, including travel insurance, personal insurance, and commercial insurance.
- General Insurance Business includes all cases submitted within Contest Period (including the first & last day), which are verified by Blue Cross (Asia Pacific) Insurance Limited and booked on or before 30 June 2024.
- Guest invitation and cash allowance are only eligible to those qualifiers who finally attended the Convention.
- Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination are excluded. The required expenses for the qualifiers and their guests will be debited from qualifiers' Company account automatically after the trip.

By Personal Production – Special Contest & Awards

Eligibility: Financial Planner Qualifier who completed the above basic requirement.

Category	Qualifier	Requirements	Award
Convention President	Min. qualify 100% (by personal production) (Any financial planner who is promoted to agency leader after 1 July 2023 is only eligible to compete for the honour of "President" by reference to his/her capacity as financial planner.)	1. Fulfil min. A&H & KFP FYC HK$51,500 and Life persistency requirement 80%, & 2. The top ranking of FYCB, & 3. Confirmed to attend "The 23rd Dragons' Meeting" will be the Convention President	• The host of the opening ceremony at the convention • Round trip limousine service transfer to and from airport of destination • Single room hotel accommodation • 1 seat of round-trip Business Class to the Convention destination
Case / Customer Super Incentive	Qualify 200% or above	Qualify 100% Case count OR No. of Customer	HK$1,000; Each qualifier is only entitled to the cash award once.

Update

Remarks: This FYCB calculation is only applicable to the qualification of Convention President, while the other requirement will remain unchanged by using FYC C&A.

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]

AIA Hong Kong

1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333

AIA.COM.HK

Memo

General Rules & Regulations

1. 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.
2. FYC Benefit on all Life, Life A&H Riders, Standalone Life A&H, PA, CS-EB, CS-Pension Corporate and CS-Pension Retail will be counted.
3. A&H business includes A&H Riders, Standalone and PA business.
4. Min. A&H & Key Focus Products (KFP) FYC production requirement includes counting of A&H and Key Focus Products (KFP) FYC. For KFP products list, please refer to appendix.
5. 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 StepUp Medical Protection Plan 2 (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
6. Customer = 1 approved Life, PA Policy, Secure First Plus – AIA Selected Member Version or StepUp Medical Protection Plan 2 during the contest period from new/existing insured is equivalent to 1 Life saved. Repeated sales to the same insured during the qualifying period are considered as 1 Life saved.
7. Joint policies will be shared evenly among the co-producers.
8. FYCB calculation is only applicable to the qualification of Convention President while the calculation of qualifying percentage of the trip will remain unchanged, i.e. keep using FYC C&A.
9. Life Persistency for all financial planners and agency leaders will be based on LIMRA 19-month formula by annualized premium on the past 12-month basis measured as of 30 June 2024 from EB persistency reports reference to agency leaders and financial planners respectively. For new SUM appointed after 31 December 2023, persistency will be based on his/her personal production.
10. Policies cancelled within cooling-off period are excluded.
11. All privileges and awards of "The 23rd Dragons' meeting: are not transferrable and payable, program is subject to AIA's final decision.
12. AIA reserved the right to amend any of the rules of this contest or offer alternative award subject to availability at any time without prior notice.
13. In the event of dispute, AIA's decision is final and conclusive.

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]

AIA Hong Kong

1/F, AIA Hong Kong Tower,
734 King's Road,
Quarry Bay, Hong Kong
T: (852) 2881 3333

AIA.COM.HK

健康長久好生活

Memo

更新 **附件 Appendix - 特選核心關鍵產品及附加契約 Key Focus Products (KFP)**

核心關鍵產品 (核心)	Key Focus Products (Core)
• 所有AIA自願醫保計劃 (VHIS)系列 (包括尊耀、靈活、標準計劃) – 只限香港 • 「尊耀」醫療計劃系列 • 「尊耀明珠」醫療計劃系列 • 「至尊醫療 5」系列 • 特級「健康之寶」2 系列 • 「癌症全方位保障 3」系列 • 簡護危疾保系列 • 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」 • 「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 • 「大灣醫薈通」門診計劃	• All AIA Voluntary Health Insurance Schemes series (including Privilege Ultra, Flexi & Standard Scheme) – Hong Kong only • Privilege Ultra Medical Plan series • Privilege Ultra Pearl Medical Plan series • CEO5 series • Super Good Health 2 series • Cancer Guardian 3 series • Simple Care Essence series • 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 • Severe Illness Medical Protection Rider Series • "AIA One Absolute – Cancer & Serious Infectious Disease Protection" series • "AIA One Absolute - Full Protection" series • Health Journey Guardian • GBA Health Connect Outpatient Plan (GBAOP)
核心關鍵產品 (其他)	**Key Focus 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」 • 簡易意外死亡及斷肢附加契約 • 危疾附加契約 • 特選危疾附加契約 • 智護癌症保 • 進泰附加契約 • 「愛伴航」/「愛伴航-首護摯寶」 • 「自在自選」危疾保	• 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) • Simplified Accidental Death & Dismemberment Rider • Critical Illness Rider Pro (CI Rider Pro) • Enhanced Critical Illness Rider Pro (ECIR Pro) • Cancer Care Essence • Super HealthGuard Pro • On Your Side Plan / On Your Side Plan – First Gift • AIA Assemble

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 2024 年 4 月 22 日 Updated as of 22 April 2024.

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Online content to be updated/在線內容將會被更新/在线内容将会被更新:

System / 系統	Section /章節/章节	Date ready / 就緒日期 /就绪日期
eAgency Corner	Bulletin > eMemo	22 August 2023

For Internal Use Only 僅供內部傳閱

[AIA – PUBLIC]