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Memo

Attn	:	All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners	From	:	Jim Jan Zen
Copy	:	Mr. Alger Fung/ Mr. Louie Ho All department Heads / ABDD Executives	Dept	:	Management Team
Date	:	5 February 2024	Total page	:	15
Subject	:	(A240208) **[Update] The 35th Summit Club – Prague, Czech Republic** **[更新] 第 35 屆高峰會 - 捷克布拉格**			

提起**捷克布拉格**這座城市，會令您聯想起什麼？「千塔之城」的美譽？還是如詩如畫的景致？答案是，第 35 屆高峰會選址、您有機會到訪的地方！這座迷人的城市擁有絢麗的建築、歷史的深度和藝術的精髓。在布拉格城堡巍然屹立之際，您會沉浸在時光的軌跡中，感受到文化的深沉底蘊，聆聽著每個雅致的角落訴說她的故事。成爲高峰會會員即有機會踏上這趟旅程，感受布拉格的獨特魅力，體驗不一樣的海外會議！

高峰會競賽期為 2024 年 1 月至 2025 年 6 月，今屆更特設 **PA 快速登「峰」路線**，於首 12 個月內達成 **2024 年卓越顧問**競賽及指定 FYC 等要求，即可率先出線**第 35 屆高峰會**；同時今屆亦新增計算**藍十字業績**，讓您快一步達成會員，一齊出發！

「第 35 屆高峰會 – 捷克布拉格」競賽項目一覽：

競賽級別	競賽項目	獲取資格方法
2024 年卓越顧問 Fast Track 競賽 - 個人業績 **基本競賽 - 個人業績**	(1) 100%至 800%會員資格 (2) 高峰會主席 (3) 最佳企業業務大獎 (4) 最佳個人自選保障方案大獎	以個人業績計算
2024 年卓越顧問 Fast Track 競賽 - 營業組別 **基本競賽 - 營業組別**	(1) 100%至 800%會員資格 (2) 高峰會會長 (3) 最佳個人自選保障方案大獎	以營業組別業績計算
區域總監獎項	(1) 100%會員資格 (2) 最佳個人自選保障方案大獎	以區域 FYC C&A/ 高峰會會員人數計算

Regards,

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

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第 35 屆高峰會 – 捷克布拉格

目的地 : 捷克布拉格
競賽日期 : 2024 年 1 月至 2025 年 6 月(共 18 個月)
競賽對象 : 所有財務策劃顧問及營業單位主管
競賽資格及要求 : 請參閱以下詳情

1) 基本競賽

100% 會員資格要求：

競賽期	級別	總 FYC C&A (港幣)#	或		個人壽險續保率	意外及醫療保險及核心關鍵產品 FYC 最低要求 (港幣)
			保單數目	客戶數目		
2024 年 1 月至 2025 年 6 月 (共 18 個月)	財務策劃顧問 – 個人業績	880,000	110	75	80%	88,000
	資深分區經理 – 營業組別業績	3,520,000	420	280	75%	352,000
	資深經理 – 營業組別業績	4,400,000	520	350	75%	440,000
	區域總監 – 營業組別業績	5,280,000	620	410	75%	528,000

200% 或以上會員的保單數目、客戶數目和意外及醫療保險及核心關鍵產品 FYC要求可獲調整或豁免：

會員	級別	或		意外及醫療保險及核心關鍵產品 FYC* 最低要求 (港幣)
		保單數目	客戶數目	
200%	財務策劃顧問 – 個人業績	55	38	需完成指定 FYC 最低要求
	資深分區經理 – 營業組別業績	210	140	
	資深經理 – 營業組別業績	260	175	
	區域總監 – 營業組別業績	310	210	
300%或以上	財務策劃顧問及營業單位主管	豁免	豁免	豁免

備註：

*會員需完成意外及醫療保險及核心關鍵產品FYC及個人壽險續保率之最低要求，方能競逐高峰會主席或會長。

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2) 2024年卓越顧問 Fast Track 競賽 *(新增)*

成為2024年卓越顧問並達到以下競賽要求，可獲 100% 會員資格：

競賽期	級別	總 FYC C&A (港幣)#	或		個人壽險續保率	意外及醫療保險及核心關鍵產品 FYC 最低要求 (港幣)
			保單數目	客戶數目		
2024 年 1 至 12 月 (共 12 個月)	財務策劃顧問 – 個人業績	820,000	74	37	80%	55,000
	資深分區經理 – 營業組別業績	3,280,000	280	140	75%	220,000
	資深經理 – 營業組別業績	4,100,000	350	170	75%	275,000
	區域總監 – 營業組別業績	4,920,000	420	200	75%	330,000

2024年卓越顧問 200% 或以上會員資格要求：

競賽期	會員	級別	或		意外及醫療保險及核心關鍵產品 FYC* 最低要求 (港幣)
			保單數目	客戶數目	
2024 年 1 月至 2025 年 6 月 (共 18 個月)	200%或以上	財務策劃顧問 – 個人業績	74	37	需完成指定 FYC 最低要求
		資深分區經理 – 營業組別業績	280	140	
		資深經理 – 營業組別業績	350	170	
		區域總監 – 營業組別業績	420	200	

備註：

更新

1. 有關 2024 年「卓越顧問」要求，及 2024 年入職之新晉財務策劃顧問的「卓越顧問」要求將根據入職月份訂立，詳情請參閱通告 A240114。
2. 如2024年卓越顧問可於首12個月內達成200%或以上會員級別之FYC C&A要求，可豁免於「2024年卓越顧問 - 個人業績」中列出的保單或客戶數目、意外及醫療保險及核心關鍵產品FYC的最低要求。
3. 卓越顧問必需於首12個月內達成「2024年卓越顧問Fast Track競賽」100%會員級別所有要求，方可於18個月內競逐更高會員級別資格，上述備註2的豁免除外。
4. 2024年卓越顧問 200%或以上會員級別，將可以2024年卓越顧問 Fast Track FYC C&A為基數 (如財務策劃顧問為港幣$820,000元) 以18個月競賽期完成200%或以上會員級別業績，並以800%會員為上限。
5. 2024年卓越顧問 Fast Track 競賽結果及得獎級別會於首12個月競賽期結束後結算，並以此級別於18個月競賽期後計算是否達標2024年卓越顧問200%或以上會員資格要求。(如資深分區經理只以個人業績達標2024年卓越顧問 Fast Track 競賽，則未能於18個月以Fast Track 之資深分區經理FYC C&A，即$3,280,000為基數計算200%或以上會員資格)
6. *會員需完成意外及醫療保險及核心關鍵產品FYC及個人壽險續保率之最低要求，方能競逐高峰會主席或會長。

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競賽規則：

1. # 不論任何會員級別，總 FYC C&A 可包含藍十字佣金，以個人業績或營業單位主管類別 100%會員級別計算的 10%為上限，詳情請參考以下列表。*(新增)*

級別	基本競賽(港幣)	2024 年卓越顧問 Fast Track 競賽(港幣)
財務策劃顧問 - 個人業績	88,000	82,000
資深分區經理 - 營業組別業績	352,000	328,000
資深經理 - 營業組別業績	440,000	410,000
區域總監 - 營業組別業績	528,000	492,000

2. 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。
3. 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 2025 年 6 月 30 日或之前入賬。
4. 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。
5. 意外及醫療保險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。
6. 意外及醫療保險及核心關鍵產品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）在內之FYC。有關核心關鍵產品名單，請參閱附件。
7. 保單數目要求計算如下，一張保單是指：
   - 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
8. 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。
9. 資深分區經理級別包括新晉資深分區經理及資深分區經理。
10. 資深經理級別包括區域經理、資深區域經理及高級資深區域經理。

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3) 區域總監 – 100%會員資格

區域總監可完成以下任何一項競賽規則而獲得100%的會員資格：

1. 與上屆高峰會競賽期(即2022年1月至2023年6月)比較之區域FYC C&A增長率^，即：

組別	總額增長率^	最低 FYC C&A 基數要求@ (港幣)
非第 34 屆高峰會之區域 FYC 增長得獎者	其區域之 FYC C&A 總額增長率達 20%	$8,508,000
第 34 屆高峰會之區域 FYC 增長得獎者	其區域之 FYC C&A 總額增長率需達 15%	

^ 如於競賽期內區內出現新晉區域總監，有關區域增長率之業績基數將會作出調整。

2. 區域總FYC C&A@ 達港幣16,094,000元
3. 區內第35屆高峰會會員人數為全區域人數之25% (區域總人數及區域內合資格第35屆高峰會會員數目以2025年6月30日為準)

備註：

@ 最低 FYC C&A 基數要求及區域總 FYC C&A 均可包含藍十字佣金，並以區域總監類別中 100%會員級別計算的10%為上限 (即最高港幣 528,000 元)。

4) 特別競賽項目及獎賞

最佳企業業務大獎

首 10 名高峰會會員達到個人企業業務實際 FYC[1-4] 港幣 225,000 元或以上且個人自選保障方案 (IVS) 業務 FYC[5] 達至港幣 100,000 元之高峰會會員，將可獲得現金獎賞港幣 4,500 元及於會議中獲得嘉許。

1. 所有團體保險保單、強積金僱主計劃及澳門退休金僱主計劃之實際 FYC 均計算入企業業務實際 FYC。
2. 要符合資格，團體保險保單必須於競賽期內：(a) 生效及 (b) 成功繳付首年保費。
3. 澳門退休金僱主計劃包括非強制性中央公積金計劃 「央積金」 和澳門私人退休金 「私退金」 計劃。
4. 要符合資格，強積金僱主計劃或澳門退休金僱主計劃必須於競賽期內：(a) 提交完整申請文件及(b) 成功清繳首年供款或由其他受託人或其他基金管理實體轉入資產。
5. 要符合資格，個人自選保障方案保單必須於競賽期內生效：(a) 提交完整申請文件；(b) 成功繳付首年保費。

最佳個人自選保障方案大獎

所有高峰會會員均可角逐以下獎項：

獎項	個人自選保障方案之最低個案要求	獎賞
首 3 名超級傑出區域 (SGDOY)	1,200	• 高峰會會員獲安排入住單人房 或 現金獎港幣 3,800元；及 • 於高峰會中獲得嘉許
首 3 名傑出區域 (GDOY)	600	
首 3 名區域 (DOY)	400	
首 3 名區域總監	200	
首 3 名資深經理	200	

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首 3 名資深分區經理	200	
首 3 名營業單位主管及財務策劃顧問	100	

1. 以上區域組別及營業單位主管職級以截至 2024 年 1 月 1 日 為準 。
2. 每個獎項將以競賽期內完成最多新「個人自選保障方案」保單數目計算（只計算最終獲繕發之保單）。如果申請屬共同個案（即個案由 2 名財務策劃顧問共同完成，每位財務策劃顧問將獲計算 0.5 個個案，且個案不會以四捨五入方式計算。
3. 如果保單數目相同，排名將會以「個人自選保障方案」保單之總首年佣金（FYC）作計算，並以最高者為得獎者。
4. 如果營業單位主管同時榮獲兩個或以上獎項，公司將以較高名次及級別為準。
5. 每位得獎者只可獲取獎賞一次。

高峰會會長及主席資格

高峰會會長及主席獎項將以實際 FYC 計算(FYCB*)。

高峰會會長

以營業單位主管所屬級別 (區域總監/ 資深經理/ 資深分區經理) 指標計算而達到最高百分率 (18 個月競賽期內完成之總 FYCB*除以 FYC C&A 指標再乘以 100%)，並出席第 35 屆高峰會議之營業單位主管，將成為高峰會會長及被邀請主持會議之開幕儀式，其他細則如下：

1. 於 2024 年 1 月 1 日或以前合約生效的營業單位主管(區域總監/資深經理/資深分區經理)才可競逐「高峰會會長」獎項。營業單位主管必需於競賽期內至會議舉行期間仍持有效之營業單位主管合約，方能獲取此項榮譽。
2. 若資深分區經理於競賽期內獲委任為資深經理，並已完成資深分區經理營業額要求之 X%，可以資深經理營業額的 100% - X%之要求而達標並爭取成為「高峰會會長」。資深經理若於競賽期內獲委任為區域總監，其榮譽資格將以上述相同方法計算。
3. 「高峰會會長」必須以營業單位主管所屬類別營業指標成為高峰會會員，並完成意外及醫療保險及核心關鍵產品最低 FYC 要求及個人壽險續保率之業績要求。營業單位主管之個人業績亦可獲計算於所屬組別業績內。

高峰會主席

1. 財務策劃顧問完成意外及醫療保險及核心關鍵產品最低 FYC 要求及個人壽險續保率之業績要求，並達到最高總 FYCB*業績及出席第 35 屆高峰會會議，將成為「高峰會主席」，並獲邀請主持會議之開幕儀式。
2. 財務策劃顧問如在 2024 年 1 月 1 日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「高峰會主席」之榮譽。

* FYCB 只用作高峰會會長及主席資格之計算，會員資格沿用 FYC C&A 之計算並不受影響

一般規則：

1. 若財務策劃顧問於競賽期內獲委任為資深分區經理，並已完成財務策劃顧問營業額要求之 X%，可以資深分區經理營業額 100% - X%之要求而取得資深分區經理出席資格。所有於競賽期間晉升之營業單位主管，其出席資格將跟以上相同方法計算。若營業單位主管於競賽期間轉職為財務策劃顧問，則需完成財務策劃顧問營業額要求方可獲出席資格。
2. 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 2025 年 6 月 30 日之 EB 續保率業績報告為準。2024 年 12 月 31 日後獲委任的新晉資深分區經理則需依照

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其個人業績計算續保率。

3. 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。
4. 特別計算之業績將不會計算於以業績位置排名的獎項內。
5. 會員級別(%)的計算方法為「競賽期內總 FYC C&A 除以 100%會員要求之總 FYC C&A」，並以 800%會員為上限。
6. 所有有關會議獎賞及出席資格不得轉讓。財務策劃顧問/營業單位主管必需於會議舉行期間仍與 AIA 持有效合約，方能出席會議並取得現金津貼。
7. 競賽結果以保單冷靜期後作調整為準。
8. AIA 保留隨時修改競賽規則之權利。
9. 如有任何異議，以 AIA 最後決定為準。

獎項:

會員	可邀請嘉賓	來回團體機票	住宿安排 (5 日 4 夜)	現金津貼 (只限會員)
100%	不適用	經濟客位 1 張	雙人房 (每位合資格出席人士佔半房)	N/A
200%				HK$3,000
300%	1 位	經濟客位 2 張		N/A
400%				HK$3,000
500%				HK$6,000
600%				HK$9,000
700%				HK$12,000
800%	2 位	經濟客位 3 張	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	N/A

- 嘉賓之邀請及現金津貼只限於出席之會員。現金津貼將會於旅程後於會員的糧單內顯示。
- 會員及同行合資格邀請嘉賓需繳付香港/澳門及會議目的地有關之機場稅及保安稅。所需之總數將會於旅程後從會員的公司戶口內自動扣除。

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The 35th Summit Club – Prague, Czech Republic

Destination	:	Prague, Czech Republic
Contest Period	:	January 2024 – June 2025 (18-month)
Eligibility	:	All Financial Planner and Agency Leader
Production Requirements	:	Please see below

1) Basic Contest

100% Qualifier Requirement:

Contest Period	Status	Total FYC C&A (HK$) #	OR		Life Persistency	Min. A&H & Key Focus Products (KFP) FYC (HK$)
			Case Count	No. of Customer		
Jan 2024 – Jun 2025 (18-month)	Financial Planner – by personal production	880,000	110	75	80%	88,000
	Senior Unit Manager – by agency production	3,520,000	420	280	75%	352,000
	Senior Manager – by agency production	4,400,000	520	350	75%	440,000
	District Director – by agency production	5,280,000	620	410	75%	528,000

Cases Count, Customer and A&H & KFP FYC requirement will be adjusted for 200% and above:

Qualifier	Status	OR		A&H & KFP FYC*
		Case Count	No. of Customer	
200%	Financial Planner – by personal production	55	38	Must fulfill min. FYC requirement
	Senior Unit Manager – by agency production	210	140	
	Senior Manager – by agency production	260	175	
	District Director – by agency production	310	210	
300% or above	Financial Planner & Agency Leader	Waived	Waived	Waived

Remarks:

*Qualifiers must fulfill minimum A&H & KFP FYC and Life Persistency requirement in respective level to be qualified to compete for the honor of Chairman or President in the Convention.

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2) 2024 Premier Advisor Fast Track Contest *(New)*

Achieved 2024 Premier Advisor and below contest requirement, will be awarded with 100% membership:

Contest Period	Status	Total FYC C&A (HK$) #	OR		Life Persistency	Min. A&H & Key Focus Products (KFP) FYC (HK$)
			Case Count	No. of Customer		
Jan – Dec 2024 (12-month)	Financial Planner – by personal production	820,000	74	37	80%	55,000
	Senior Unit Manager – by agency production	3,280,000	280	140	75%	220,000
	Senior Manager – by agency production	4,100,000	350	170	75%	275,000
	District Director – by agency production	4,920,000	420	200	75%	330,000

200% or above membership requirement for 2024 Premier Advisor:

Contest Period	Qualifier	Status	OR		A&H & KFP FYC*
			Case Count	No. of Customer	
Jan 2024 – Jun 2025 (18-month)	200% or above	Financial Planner – by personal production	74	37	Must fulfill min. FYC requirement
		Senior Unit Manager – by agency production	280	140	
		Senior Manager – by agency production	350	170	
		District Director – by agency production	420	200	

Remarks:

Update

1. 2024 Premier Advisor requirements and Premier Advisor requirements for New Financial Planners contracted in 2024 are on pro-rata basis according to the contracted month. For details, please refer to memo A240114.
2. If 2024 Premier Advisor can achieve 200% or above membership's FYC C&A requirement within the first 12-month of contest period, the requirement of case count, count of customer and A&H & KFP minimum requirement will be waived.
3. 2024 Premier Advisor must complete the full requirement of 100% membership of "2024 Premier Advisor Fast Track Contest" within the first 12-month of contest period, in order to compete for higher membership qualification in the 18-month contest period, except Remarks 2 above mentioned.
4. 200% or above membership of 2024 Premier Advisor will be calculated based on the FYC C&A requirement of "2024 Premier Advisor Fast Track Contest" (e.g. HK$820,000 for Financial Planner) during the 18-month contest period. The maximum qualification is capped at 800%.
5. 2024 Premier Advisor Fast Track results and membership qualification will be settled after the end of the first 12-month contest period and as a result to calculate any higher membership qualification in the 18-month contest period. (e.g. If Senior Unit Manager ONLY qualifies Fast Track by personal production level, he/she will NOT be eligible to calculate 200% or above membership qualification base on Fast Track – Senior Unit Manager level's FYC C&A requirement (i.e. 3,280,000).)

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6. *Qualifiers must fulfill minimum A&H & KFP FYC and Life Persistency requirement in respective level to be qualified to compete for the honor of Chairman or President in the Convention.

Qualifying Rules:

1. #Regardless of qualifier category, the total FYC C&A can include the amount of Blue Cross commission up to 10% of 100% Personal or Agency Production level. Please refer to below table for details. *(New)*

Status	Basic Contest (HK$)	2024 Premier Advisor Fast Track Contest (HK$)
Financial Planner – by personal production	88,000	82,000
Senior Unit Manager – by agency production	352,000	328,000
Senior Manager – by agency production	440,000	410,000
District Director – by agency production	528,000	492,000

2. General Insurance Business defines as all general insurance policies issued by Blue Cross, including travel insurance, personal insurance, and commercial insurance.
3. 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 2025.
4. 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.
5. A&H business includes A&H Riders, Standalone and PA business.
6. Min. A&H & Key Focus Products (KFP) FYC production requirement includes counting of A&H and KFP FYC. For KFP list, please refer to appendix.
7. Case count calculation including the followings, for 1 case count refers to:
   - 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
8. 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 Life saved. Repeated sales to the same insured during the qualifying period are considered as 1 Life saved.
9. The level of Senior Unit Manager (SUM) includes New Senior Unit Manager and Senior Unit Manager.
10. The level of Senior Manager (SM) includes Branch Manager, District Manager and Senior District Manager.

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3) District Director – 100% qualification

District Director can qualify as a 100% qualifier either by:

1. Achieve respective District Total FYC C&A growth^ compared with last Summit Club period (January 2022 to June 2023):

Category	FYC C&A growth^	Min. FYC C&A base requirement@ (HK$)
Non-District Growth Award Qualifier of the 34th Summit Club	20% growth	$8,508,000
District Growth Award Qualifiers of the 34th Summit Club	15% growth	

^If new District Director is appointed in a District within the contest period, respective District's base will be adjusted for whole Summit Club period

2. Achieved District Total FYC C&A@ HK$16,094,000
3. 25% of respective district members qualify for the 35th Summit Club (No. of qualifiers divided by total no. of district members, both counting on 30 June 2025)

Remarks:
@Min. FYC C&A base requirement and District Total C&A can include the amount of Blue Cross commission up to 10% of 100% membership FYC C&A of DD level. (i.e. up to HK$528,000)

4) Special Contest and Awards

Top Corporate Business Award

Top 10 qualifiers of the Summit Club by highest Corporate Solutions' Actual FYC[1-4] achieving a minimum of HK$225,000 and a minimum of HK$100,000 FYC[5] with IVS Business will be awarded HK$4,500 cash award and recognized at the convention meeting.

1. Actual FYC for all Group Insurance Policy(ies), MPF Employer Plans and Macau Pension Corporate Cases will be counted as Corporate Solutions Business Actual FYC.
2. Each Group Insurance Policy is eligible if a) the Policy is effective and b) the First Year Premium is successfully settled during the Contest Period.
3. Macau Pension Corporate Case includes Central Provident Fund (CPF) Scheme and Private Pension Fund (PPF) Scheme.
4. Each MPF Employer Plan/ Macau Pension Corporate Case is eligible if, (a) all application documents are submitted and (b) the First Year Contribution is settled or the Assets Taken Over ("ATO") from external trustees or other fund management entity is successfully transferred-in within the Contest Period.
5. Each IVS Policy is eligible if, (a) all application documents are submitted and (b) the First Year Contribution is settled within the Contest Period.

Top Individual Voluntary Solutions ("IVS") Award

The 35th Summit Club qualifiers can compete the below awards:

Entitlement	Min. IVS cases Requirement	Award
Top 3 Super Grand Districts of the Year ("SGDOY")	1,200	– Single Room Accommodation or HKD3,800 Cash Award;
Top 3 Grand Districts of the Year ("GDOY")	600	
Top 3 Districts of the Year ("DOY")	400	

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Top 3 District Director	200	– Being recognized at the Convention
Top 3 Senior Manager	200	
Top 3 Senior Unit Manager	200	
Top 3 Agency Leaders & Financial Planners	100	

1. All of the above District and Agency Leaders' titles are referenced as at 1 January 2024.
2. Each award will be ranked by the total number of IVS cases completed (Only policies successfully issued will be counted) within the Contest Period. If eligible policies/cases are jointly closed by 2 Financial Planners, 0.5 case will be counted for each Financial Planner. Case count calculation will not be rounded-up.
3. In case of the same number of case count, results will be ranked by the accumulated FYC of the IVS policy(ies) with the highest FYC as winner.
4. If an Agency Leader is entitled to 2 or more awards at the same time, the ranking and category whichever is higher will be adopted.
5. Each qualifier is entitled to the award for once only.

Convention Chairman and President Qualification

The award of Convention Chairman and President will count Actual FYC (FYCB*).

Convention Chairman

The Top Agency Leader with the highest percentage in his / her own category of DD / SM / SUM (Total FYCB* achieved during 18-month contest period divided by Total FYC C&A quota x 100%) and who attends the 35th Summit Club will be the Chairman to officiate at the opening of the Convention. Other details are as follows:

1. The qualifier must be contracted as an agency leader (District Director/Senior Manager/Senior Unit Manager) effective on or before 1 January 2024. This honour is solely restricted to an agency leader who holds a valid agency leader's contract with AIA during the qualifying period up to the time of the Convention.
2. A SUM who is promoted to SM during the qualifying period but only fulfilling X% of the SUM's quota requirement may qualify by achieving 100% -X% of SM quota requirement and seek qualification as Convention Chairman. The same principle will apply to an SM if he/she is promoted to DD during the qualifying period.
3. The Convention Chairman must be a qualifier of the Convention by reference to agency production and fulfills respective minimum A&H & KFP FYC and Life persistency requirement. Agency leader's personal production will also be counted into the agency production.

Convention President

1. The Top Financial Planner who attends the 35th Summit Club with the highest Total FYCB* and fulfills minimum A&H & KFP FYC and Life persistency requirement will be the President to officiate at the opening of the Convention.
2. Any financial planner who is promoted to an agency leader after 1 January 2024 is only eligible to compete for the honour of "President" by reference to his/her capacity as financial planner.

* This FYCB calculation is only applicable to the qualification of Convention Chairman & President while the calculation of qualifying percentage of the trip will remain unchanged. i.e. keep using FYC C&A.

General Rules & Regulations:

1. A financial planner who is promoted as Agency Leader during the qualifying period and only fulfills X% of financial planner's quota can qualify by his / her new title category by reference to quota of new title category (100% - X%). The same principle will apply to promotion of any other leader level during the qualifying period.

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For any agency leader who is demoted during the qualifying period, he/she needs to fulfill the requirements under the demoted title.

2. 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 2025 from EB persistency reports reference to agency leaders and financial planners respectively. For new SUM appointed after 31 December 2024, persistency will be based on his/her personal production.
3. 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.
4. Production from any special count will not be counted in Top Ranking Awards.
5. The percentage of qualification is calculated as "Total FYC C&A produced during contest period divided by Total FYC C&A production requirement of 100%" and the maximum qualification capped at 800%.
6. All the privileges and awards of related Convention are not transferable and are restricted to financial planners /agency leaders who hold valid contracts with AIA at the time of the Convention being organized.
7. Policies cancelled within cooling-off period are excluded.
8. AIA reserves the right to amend any of the rules of this contest (program) at any time without prior notice.
9. In the event of any dispute, AIA's decision is final.

Awards:

Qualifier	Guest Observer	Round-Trip Group Air Ticket	Hotel Accommodation (5-day/4-night)	Cash Allowance (For qualifier only)
100%	N/A	Economy Class x 1	Twin Sharing	N/A
200%				HK$3,000
300%	1	Economy Class x 2		N/A
400%				HK$3,000
500%				HK$6,000
600%				HK$9,000
700%				HK$12,000
800%	2	Economy Class x 3	Single room for Qualifier and Twin sharing for Guest observers	N/A

- Guest invitation and cash allowance is only eligible to those qualifiers who finally attend the Convention. Allowance will be credited to qualifiers' Company payroll automatically after the trip.
- Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination are exclusive. The required expenses for the qualifiers and their guests will be debited from qualifiers' Company account automatically after the trip.

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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) • 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	**Key Focus Products (Core)** • 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) • 「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	**Key Focus Products (Others)** • 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）。
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