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Memo

Attn:	All EDDAs & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong Only)	From:	Business Training and Development
Co/Dept:	Mr. Alger Fung / All Department Heads / All ABDD Executives / All BTDD Members		
Date:	1 February 2024	Total Page:	4

Subject: (A240219) Latest information on iPoS Sign Everywhere and AIA Easy Sign
iPoS「友得簽」及「智易簽」最新資訊

為方便財務策劃顧問更容易了解 iPoS「友得簽」及「智易簽」平台的特點及兩者之分別，請參閱以下之圖表:

	友得簽 (iPoS Sign Everywhere)	智易簽 (AIA Easy Sign)
適用營業同事	所有財務策劃顧問	過去兩年無投訴紀錄的財務策劃顧問
適用客戶	所有持香港身分證之客戶	所有客戶 (需特別照顧之客戶除外)
適用產品	所有免財務需要分析(FNA)的產品	所有長期業務保險產品
形式	根據一般銷售流程，進行遙距銷售。 客戶需透過一次性密碼(OTP)及電子簽署，確認及簽署投保文件。	透過「Microsoft Teams」的同步視訊及螢幕分享，進行整個銷售流程，並透過其錄影功能錄影整個銷售過程。 (客戶可要求「不同意」錄影/錄音; 唯「不同意」的決定需錄影) 客戶需透過一次性密碼(OTP)及電子簽署，確認及簽署投保文件。
銷售資格 (內部牌照要求)	沒有	內部牌照 VO01 + VO02
培訓資料 位置	i學院 (iAcademy) > 網上學習課程 > 友邦應用程式 > iPoS「友得簽」	i學院 (iAcademy) > 網上學習課程 > 內部牌照 > 智易簽 (AIA Easy Sign) (VO01+VO02)

有關申請及使用「友得簽」/「智易簽」所需手續，詳情請參閱通告A220341。

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營業培訓及發展部

为方便财务策划顾问更容易了解 iPoS「友得签」及「智易签」平台的特点及两者之分别，
请参阅以下之图表:

	友得签 (iPoS Sign Everywhere)	智易签 (AIA Easy Sign)
适用营业同事	所有财务策划顾问	过去两年无投诉纪录的财务策划顾问
适用客户	所有持香港身分证之客户	所有客户 (需特别照顾之客户除外)
适用产品	所有免财务需要分析(FNA)的产品	所有长期业务保险产品
形式	根据一般销售流程，进行遥距销售。 客户需透过一次性密码(OTP)及电子签署，确认及签署投保文件。	透过「Microsoft Teams」的同步视讯及萤幕分享，进行整个销售流程，并透过其录影功能录影整个销售过程。 (客户可要求「不同意」录影/录音; 唯「不同意」的决定需录影) 客户需透过一次性密码(OTP)及电子签署，确认及签署投保文件。
销售资格 (内部牌照要求)	没有	内部牌照 VO01 + VO02
培训资料 位置	i学院 (iAcademy) > 网上学习课程 > 友邦应用程式 > iPoS「友得签」	i学院 (iAcademy) > 网上学习课程 > 内部牌照 > 智易签(AIA Easy Sign) (VO01+VO02)

有关申请及使用「友得签」/「智易签」所需手续，详情请参阅通告A220341。

如有任可查询，请电邮致 hk.businesstrainingandevelopment@aia.com。

营业培训及发展部

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To facilitate financial planner's understanding and the difference between "iPoS Sign Everywhere" and "AIA Easy Sign", please refer to below table:

	iPoS Sign Everywhere	AIA Easy Sign
Applicable agents	All Financial Planners	Financial Planners who do not have any complaint record in past 2 years
Applicable customers	All HKID cardholders	All customers (except vulnerable customers)
Applicable Products	All FNA exempted products	All Long-Term Insurance Products
Format	Refer to normal sales process to conduct remote selling One Time Password (OTP) & E-Signature function will be used to confirm and sign application documents by the customer	The entire sales process needs to be recorded through the built-in screen sharing & video recording function in "Microsoft Teams" (Customer can choose "Opt-out" for video recording/voice recording; the "Opt-out" decision shall be recorded) One Time Password (OTP) & E-Signature function will be used to confirm and sign application documents by the customer
Sales Qualification (Internal License)	Nil	Internal License VO01 + VO02
Training Material Location	iAcademy > E-Learning Training > AIA-APPS > iPoS Sign Everywhere	iAcademy > E-Learning Training > Internal License > AIA Easy Sign (VO01+VO02)

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For required procedures on applying for and using "iPoS Sign Everywhere" and "AIA Easy Sign", please refer to Memo A220341.

If you have any enquiries, please email us at hk.businesstrainginganddevelopment@aia.com.

Business Training and Development Department

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