友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners	From:	Amelie Shen
Copy:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / All Department Heads / ABDD Executives / Contact Centre	Dept:	Corporate Solutions
Date:	8 March 2024	Total pages:	2 + Appendix
Subject:	**(A240322) 「個人自選保障方案（IVS）年度獎」大革新 Revamp of "IVS Annual Awards"**		

好消息！有鑑於「個人自選保障方案（IVS）」已正式成為友邦香港及澳門的重點開拓業務，企業業務希望能全方位支援各營業同事全面開拓 IVS 業務，除早前強勢推出「IVS 強勁銷售攻略」及 2024 年第 1 季「友獎賞」IVS 尊屬競賽獎賞外，現再下一城，誠意推出**「個人自選保障方案（IVS）年度獎」大革新**，以激勵各營業同事全力搶佔 IVS 市場！

「個人自選保障方案（IVS）年度獎」大革新將有 **3 大更新**：

更新		**《2023 年會籍及獎賞手冊》** 已被取代	**《2024 年會籍及獎賞手冊》** 全新
#1	IVS 年度獎 數目及組別	共 8 個獎項 2 個組別：區域總監及財務策劃顧問	共 **12 個**獎項 **3 個組別**：區域總監、 **營業單位主管**及財務策劃顧問
#2	業績要求	只計算來自該年度 新團體保險客戶及 新退休金企業 / 個人客戶之 IVS 生意	計算來自**所有**團體保險客戶及 退休金企業 / 個人客戶之 **IVS 生意**
#3	獎杯頒發安排	在 AAC 上頒發所有獎盃	**在 AAP 上頒發排名第一之 4 個獎盃** 及 在 AAC 上頒發其餘 8 個獎盃

AAC = 傑出壽險從業員慶祝會　　AAP = 傑出壽險從業員頒獎典禮

2024 年獎項詳情如下：

組別*	**符合資格之計算期**	**IVS 年度獎**	**最低獲獎要求**	
			IVS 首年佣金（FYC）	**保單數目**
區域總監	依本銷售年度計算	**首 3 名**最高 IVS 業績之區域總監	HK$2,000,000	-
營業單位主管		**首 3 名**最高 IVS 業績之營業單位主管	HK$500,000	-
財務策劃顧問		**首 3 名**最高 IVS 業績之財務策劃顧問	HK$250,000	-
		首 3 名最高 IVS 保單數目之財務策劃顧問	-	80

*區域總監及營業單位主管均可以其個人業績取得財務策劃顧問組別之獎項。

有關個人自選保障方案（IVS）之定義，請參閱《2024 年會籍及獎賞手冊》第 8.1.1 部分之詳情。有關「個人自選保障方案（IVS）年度獎」之詳情，請參閱最新《2024 年會籍及獎賞手冊》第 8.1.1 及 8.2.1 部分（附件 A）。

如有任何查詢，歡迎與負責貴區之企業業務營業拓展部同事 / IVS 團隊聯絡。

祝　業務蒸蒸日上！

「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).
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Memo

Good news! In view of " Individual Voluntary Solution (IVS)" has officially become the key business driver of AIA Hong Kong and Macau, Corporate Solutions is determined to give you full support in developing all-round IVS business. In addition to the earlier launch of "IVS Strong Sales Support Tools" and "2024 Q1 IVS Exclusive Contest Rewards", we are now taking another step forward and cordially launch **the Revamp of "IVS Annual Awards"** to encourage all producers to seize the IVS market with their full strength!

The Revamp of "IVS Annual Awards" will have **3 major updates**:

Update		2023 Clubs and Awards Manual (Has been superseded)	2024 Clubs and Awards Manual (NEW)
#1	No. of IVS Annual Awards and Categories	8 awards in total 2 categories: District Director and Financial Planner	**12 awards** in total **3 categories**: District Director, **Agency Leader** and Financial Planner
#2	Production Requirements	Only IVS business generated from new group insurance customers and new corporate/retail pension customers of the year is counted	**All IVS business** generated from group insurance customers and corporate/retail pension customers is counted
#3	Award Presentation Arrangement	All trophies are presented at the AAC	**The 4 top trophies are presented at AAP** and the remaining 8 trophies are presented at AAC

AAC = Agency Awards Celebration Party AAP = Annual Awards Presentation

Details of the 2024 awards are as follows:

Category*	Qualifying Period	IVS Annual Awards	Minimum Requirements	
			IVS First Year Commission (FYC)	Policy Count
District Director	Following Current Sales Year	**Top 3** District Directors with the highest IVS production	HK$2,000,000	-
Agency Leader		**Top 3** Agency Leaders with the highest IVS production	HK$500,000	-
Financial Planner		**Top 3** Financial Planners with the highest IVS production	HK$250,000	-
		Top 3 Financial Planners with the highest IVS Policy Count	-	80

*District Directors and Agency Leaders can qualify for the awards of Financial Planner category based on their individual performance.

For the definition of IVS, please refer to Section 8.1.1 of the "2024 Clubs and Awards Manual" for details. For details about the "IVS Annual Award", please refer to Sections 8.1.1 and 8.2.1 of the latest "2024 Clubs and Awards Manual" (Appendix A).

If you have any questions, please contact your designated CSBD Agency executives/IVS Team.

We wish you every success!

Yours faithfully,

Amelie Shen
Chief Corporate Solutions Officer
AIA Hong Kong and Macau

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8. 團體業務

Appendix A

8.1 個人業績級別

8.1.1 CS 個人自選保障方案（IVS）年度獎

在銷售年度符合以下要求的財務策劃顧問將有資格領取獎項。

個人自選保障方案（IVS）最佳銷售大獎

(A) 合資格者

所有香港及澳門之財務策劃顧問

(B) 符合資格計算期

依本銷售年度計算

(C) 符合資格之規則

獎項	要求
首 3 名最高個人自選保障方案業績之財務策劃顧問	個人取得 首年佣金（FYC）HK$ 250,000 或以上
首 3 名最高個人自選保障方案保單數目之財務策劃顧問	個人取得 80 張保單或以上

(D) 獎項

1. 上述所有類別排名第一的獎盃將在傑出壽險從業員頒獎典禮（AAP）上頒發。
2. 所有其他獎盃則在傑出壽險從業員慶祝會（AAC）上頒發。

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8.2 區域／營業單位級別

8.2.1 CS 個人自選保障方案（IVS）年度獎

在銷售年度符合以下要求的營業單位主管將有資格獲取獎項。

個人自選保障方案（IVS）最佳銷售大獎

(A) 合資格者

所有香港及澳門區域總監及營業單位主管

(B) 符合資格計算期

依本銷售年度計算

(C) 符合資格之規則

獎項	要求
首 3 名最高個人自選保障方案業績之營業單位主管	營業單位取得 首年佣金（FYC）HK$ 500,000 或以上
首 3 名最高個人自選保障方案業績之區域總監	區域取得 首年佣金（FYC）HK$ 2,000,000 或以上

定義

(D) 獎項

1. 上述所有類別排名第一的獎盃將在傑出壽險從業員頒獎典禮（AAP）上頒發。
2. 所有其他獎盃則在傑出壽險從業員慶祝會（AAC）上頒發。

註: 有關個人自選保障方案之定義，請參閱會籍及獎賞 - 第 8. 1. 1 部分之詳情。

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（202401）
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8. CORPORATE BUSINESS

8.1 Producer Level

8.1.1 CS IVS (Individual Voluntary Solution) Annual Award

Financial Planner who has fulfilled the following requirements in a sales year will be eligible for the award.

IVS (Individual Voluntary Solution) Annual Award

(A) Eligibility

All Hong Kong and Macau Financial Planners

(B) Qualifying Period

Follow current sales year

(C) Qualifying Rules

Awards	Requirements
Top 3 producers	Achieved the highest IVS production with a minimum FYC of HK$ 250,000
Top 3 producers	Achieved the highest IVS policy count with a minimum of 80 policies

(D) Awards

1. Trophies for the Top Producer of the above categories will be presented at Annual Awards Presentation (AAP).
2. All other trophies will be presented at Agency Awards Celebration Party (AAC).

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8.2 District / Agency Level

8.2.1 CS Annual Award – IVS (Individual Voluntary Solution)

Agency Leaders who have fulfilled the following requirements in a sales year will be eligible for the award.

IVS (Individual Voluntary Solution) Annual Award

(A) Eligibility

All Hong Kong and Macau District Directors and Agency Leaders

(B) Qualifying Period

Follow current sales year

(C) Qualifying Rules

Awards	Requirements
Top 3 Agency Leaders	Achieved a minimum FYC of HK$ 500,000 by agency unit
Top 3 District Directors	Achieved a minimum FYC of HK$ 2,000,000 by district

(D) Award

1. Trophies for the Top Producer of the above categories will be presented at Annual Awards Presentation (AAP).
2. All other trophies will be presented at Agency Awards Celebration Party (AAC).

Remarks: Please refer to the Clubs and Awards Manual section 8.1.1 for IVS definition.

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