AIA Hong Kong

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Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	**From:**	Kenneth Luk
		Dept:	Customer and Marketing
Copy:	Mr. Alger Fung Ms. Melissa Wong All Department Heads Macau CEO / ABDD Executives	**Total pages:**	9
Date:	1 April 2024		

Subject: **A240403** **2024 第二季「愛伴航」系列限時禮遇推廣活動**
2024 Q2 On Your Side Plan Series Limited Time Offer Promotion Campaign

特選客戶成功投保「愛伴航」系列
首年年度化保費達 21,000 美元
可額外獲得免費健康檢查 (價值 HK$1,000)

2024 第二季「愛伴航」限時禮遇推廣活動

推廣期	• 2024 年 4 月 1 日至 2024 年 6 月 30 日 (包括首尾兩天)，而該「愛伴航」系列(包括「愛伴航」/ AIA 健康系列：「愛伴航」)新保單必須於推廣期內申請及遞交（根據申請及遞交日期）。 • 新保單須於 2024 年 8 月 31 日或之前繕發。
特選客戶	• 持有有效的 AIA「個人人壽」/「個人意外」保單的現有客人*, 包括而不限於本地客戶、入境優才及抵港抵澳內地人士(MCV) (*現有客人資料截至2024年3月 27日) 註: 有關此禮遇之推廣訊息只會發送給香港(Opt-in)客戶及澳門(Opt-in)客戶
特選客戶名單	客戶名單於 2024 年 4 月 1 日起上載至以下專頁 (附錄 1) • 營業員專頁 (eAC) > 競賽報告 > 推廣計劃 > 客戶名單(其他資訊) ➢ 2024 第二季「愛伴航」系列限時禮遇推廣活動 - 特選客戶名單

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限時禮遇詳情	特選客戶於推廣期內成功投保「愛伴航」系列新保單而首年年度化保費達 21,000 美元或以上，可額外獲得免費指定健康檢查計劃一次 (價值 HK$1,000) 。 註: • 新保單必須於推廣期內申請及遞交，並於 2024 年 8 月 31 日或之前繕發。 • 每張新保單首年年度化保費必須達 21,000 美元或以上，若特選客戶於推廣期內投保多於一張合資格保單，每位合資格客戶只可獲得禮遇一次。 • 指定健康檢查計劃由 AIA 指定之第三方服務供應商提供。 • 客戶可選擇價值 HK$1,000 的免費指定檢查計劃，或升級至特定增值計劃。 不論任何選擇，所贈送禮遇的金額價值均為 HK$1,000。如客戶選擇升級計劃，則須支付額外的增值計劃費用。 • AIA 財務策劃顧問不可以參與此活動，AIA 員工除外。 • 客戶必須已向本公司提供有效的電郵地址作通知及領獎安排，否則，獲獎資格將有可能被取消。 • 有關之條款及細則，請參閱附錄 2。
活動推廣	推廣電郵會於 2024 年 4 月 26 日起發送至特選客戶 (附錄 3) 註: • 有關此禮遇之推廣訊息只會發送給香港(Opt-in)客戶及澳門(Opt-in)客戶
禮遇派發安排	當合資格新保單於限時推廣期內成功繕發後，AIA 將於 2024 年 9 月 30 日前透過電郵直接發送禮遇予該保單持有人。客戶必須向 AIA 指定之第三方服務供應商提供電郵內的兌換碼以進行預約檢查。 註: • 於發放禮遇時，該保單必須仍然生效，否則客戶之得獎資格將被取消。
得獎客戶名單	得獎客戶名單將於 2024 年 9 月 16 日起上載至以下專頁 (附錄 1) • 營業員專頁 (eAC) > 競賽報告 > 推廣計劃 > 客戶名單(其他資訊) ➢ 2024 第二季「愛伴航」系列限時禮遇推廣活動 – 得獎客戶名單

推廣期有限，請把握推廣良機，盡快與客人聯絡！

如有任何疑問，請使用 iEngage / PES 內的 Chatbot 查詢，或電郵至客戶及市場策劃 (Customer and Marketing) AIAHK.CustomerExperience-ECM@aia.com.

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Selected customers successfully apply for On Your Side Plan Series (OYS) with at least US$21,000 first year annualized premium will receive a free health check-up (valued at HK$1,000)

2024 Q2 On Your Side Plan Series Limited Time Offer Promotion Campaign

Promotion Period	• 1 April 2024 – 30 June 2024 (Both dates inclusive and applicable to new On Your Side policy application date and submission date). • The new On Your Side Plan Series policy (include On Your Side Plan / AIA Vitality: On Your Side Plan) must be issued on or before 31 August 2024.
Selected Customer	• Existing customers* who hold any valid AIA "Individual Life Insurance" / "Personal Accident (PA)" policy Including but not limited to local customers, talents from admission schemes, and the mainland Chinese visitors (MCV) to Hong Kong and Macau (*Data of existing customers as of 27 March 2024) Remarks: The promotional information regarding this offer will be sent to HK (Opt-in) and Macau (Opt-in) customers only
Selected Customer List	Selected customer list is available in below portal starting from 1 April 2024. (Appendix 1) • Agency Corner (eAC) > Contests > Campaigns > Customer List (Info) ➢ 2024 Q2 On Your Side Plan Series Limited Time Offer Promotion Campaign - Selected Customer List
Limited Time Offer Details	During the promotion period, selected customers who successfully apply for new On Your Side Plan Series with at least US$21,000 or above first year annualized premium will receive a free designated health check-up (valued at HK$1,000). Remarks: • The new policy must be applied and submitted during the promotion period and issued by 31 Aug 2024. • Each eligible policy must be at least US$21,000 or above first year annualized premium, if selected customers apply for more than one policy during the promotion period, each qualified customer is entitled to the Limited Time offer once only. • The designated health check-up is provided by the designated third-party service provider of AIA. • Customers have the option to select the free designated health check-up valued at HK$1,000 or upgrade to top-up plans. The value of the offer remains at HK$1,000 regardless of their choice. If customers choose to upgrade their plans, they will be required to pay for the additional top-up amount. • The participants must provide valid email address to AIA for prize notification and

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	redemption otherwise the winners may be disqualified for the offer. • Financial planners of AIA are not eligible for participating in this promotion except employees of AIA. • Please refer to Appendix 2 for the terms & conditions.
Promotion	Promotion eDM will be blasted to selected customer starting from 26 April 2024 (Appendix 3) • Remarks: The promotional information regarding this offer will be sent to HK (Opt-in) and Macau (Opt-in) customers only.
Reward Fulfilment Arrangement	Upon the issuance of an eligible new policy during the promotional period, the reward will be sent to the eligible policyholder's email by 30 Sep 2024. Customers must provide the redemption code stated in the email to schedule a health check-up appointment with the designated third-party service provider of AIA. Remarks: • The eligible new policy must still be in force at the time of issuance of the e-voucher, otherwise the customer's eligibility for the reward will be forfeited.
Reward Winner list	The winner list will be available in the below portal from 16 Sep 2024 (Appendix 1) • Agency Corner (eAC) > Contests > Campaigns > Customer List (info) 2024 Q2 On Your Side Plan Series Limited Time Offer Promotion Campaign – Winner List

Limited-time offers! Please seize the sales opportunity!

Should you have any queries, please enquire by using Chatbot in iEngage/PES or email to Customer and Marketing at AIAHK.CustomerExperience-ECM@aia.com.

Best regards,

Kenneth Luk
Head of Customer and Growth Marketing

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附錄 1：營業員專頁 (eAC) - 客戶名單
Appendix 1: Agency Corner (eAC) – Customer List

營業員專頁 (eAC) > 競賽報告 > 推廣計劃 > 客戶名單(其他資訊) >
Agency Corner (eAC) > Contests > Campaigns > Customer List (Info) >

2024 第二季「愛伴航」系列限時禮遇推廣活動 – 特選客戶名單 (上載日期：2024年4月1日)
2024 Q2 On Your Side Plan Series Limited Time Offer Promotion Campaign – Selected Customer List (Upload date: 1 April 2024)



推廣計劃

活動名稱： 2024 第二季「愛伴航」限時禮遇推廣活動– 特選客戶名單

溫馨提示：
- 所有銷售活動及投保申請必須在香港及澳門境內進行。
- 營業員必須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及"抵港內地人士認識手續之工作流程"。
- 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。

您必須獲得客戶同意Opt In，方可向客戶進行任何推廣及銷售活動。請按此下載直接促銷及客戶轉介指引(通告A160127) 以瞭解有關詳情。請按此進入Opt-In Request 網上表格。

客戶的Opt Out狀況更新至資料上載日期。若已協助客戶完成Opt-in程序，則可無需理會此狀況，敬請留意。

*電子保費現金券狀況乃2024年1月1日的資料並只供參考。於客戶投保前，財務策劃顧問請透過PES或iChange瞭解客戶電子保費現金券之最新餘額。

客戶群銷售工具

保單持有人姓名/現時歲數/性別	參考保單	保單持有人聯絡電話號碼	保單持有人生日日期 (MM/DD/YYYY)	持有「愛伴航」危疾保障計劃?	持有有效儲蓄保單?	優易核保優惠特選客戶?	客戶購買潛力	持有保費現金券 (US$1,250/pc) (HK$10,000/pc)*	持有保費現金券 (US$63/pc) (HK$500/pc)*	持有保費現金券 (US$13/pc) (HK$100/pc)*	拒收訊息	客戶群組
DWDW 35 / F	K414730122	90887799	01/01/1999	否	是	是	H	是	否	否	否	上位新人類

營業員專頁 (eAC) > 競賽報告 > 推廣計劃 > 客戶名單(其他資訊) >
Agency Corner (eAC) > Contests > Campaigns > Customer List (Info) >

2024 第二季「愛伴航」系列限時禮遇推廣活動 – 得獎客戶名單(上載日期：2024年9月16日起)
2024 Q2 On Your Side Plan Series Limited Time Offer Promotion Campaign – Winner List (Upload date: 16 Sep 2024)



推廣計劃

活動名稱： 2024 第二季「愛伴航」限時禮遇推廣活動 – 得獎客戶名單

溫馨提示：
- 所有銷售活動及投保申請必須在香港及澳門境內進行。
- 營業員必須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及"抵港內地人士認識手續之工作流程"。
- 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。

您必須獲得客戶同意Opt In，方可向客戶進行任何推廣及銷售活動。請按此下載直接促銷及客戶轉介指引(通告A160127) 以瞭解有關詳情。請按此進入Opt-In Request 網上表格。

客戶的Opt Out狀況更新至資料上載日期。若已協助客戶完成Opt-in程序，則可無需理會此狀況，敬請留意。

保單持有人姓名/現時歲數/性別	參考保單	保單持有人聯絡電話號碼	保單持有人生日日期 (MM/DD/YYYY)	拒收訊息	獲享免費健康檢查?	客戶群組
DWDW 35 / F	K414730122	90887799	01/01/1999	否	是	上位新人類

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附錄 2：2024 第二季「愛伴航」系列限時禮遇推廣活動條款及細則

1. 此推廣活動由友邦保險(國際)有限公司(於百慕達註冊成立之有限公司) 之香港及/或澳門分行(「AIA」)主辦，推廣期為2024年4月1日至2024年6月30日，包括首尾兩天（「推廣期」），而該新保單必須於推廣期內申請及遞交（根據申請及遞交日期）並成功於 2024年8月31日或之前繕發。
2. 此優惠不適用於計劃轉換(包括基本計劃或附加契約，如適用)，不論由其他保險產品轉換至推廣保險產品及/或由推廣保險產品轉換至其他保險產品。
3. 特選客戶須於推廣期內成功投保「愛伴航」系列及該新保單首年年度化保費金額達21,000美元或以上，可獲享由AIA指定之第三方服務供應商提供 免費指定健康檢查一次 (價值 HK$1,000) (「禮品」)。
4. 若特選客戶於推廣期內投保多於一張合資格保單，每位合資格客戶只可獲贈禮品一次。
5. 客戶必須已向本公司提供有效的電郵地址作通知及領獎安排，否則，獲獎資格將有可能被取消。
6. 當合資格新保單於推廣期內成功繕發後，禮品將於2024年9月30日前透過電郵直接發放予該保單持有人。於發放禮品時，該保單必須仍然生效否則客戶之獲獎資格將被取消。
7. AIA指定之第三方服務供應商屬於香港機構。禮品由AIA指定之第三方服務供應商於香港提供服務，並只適用於年滿18歲或以上的合資格客戶。禮品換領資格可以轉讓予其他合資格人士，但不可兌換成現金或轉換為其他服務或產品。
8. 禮品逾期無效，於使用後即告作廢，如遺失將不會獲補發。
9. AIA 並非禮品的製造商 / 供應商並不就禮品承擔任何義務和責任。由禮品引起的任何爭議均由參加者和製造商 / 供應商直接解決。禮品之使用受限於條款和細則，有關禮品使用詳情，請參閱其條款及細則。
10. 此推廣並不適用於在相關推廣期之前已遞交或已繕發但其後於相關推廣期內撤回投保申請或取消保單，並再次投保相同保險產品之客戶。
11. 優惠以及相關之換領期限受限於供應商規定的條款和細則，有關優惠之使用詳情，請參閱其條款及細則。AIA並非有關優惠的供應商並不就優惠承擔任何義務和責任。由優惠引起的任何爭議均由客戶和供應商直接解決。
12. AIA 有權隨時更改本推廣活動的條款及細則而無須另行通知。各推廣優惠均只在推廣保險產品可以接受投保申請時有效。如有關優惠未能提供，AIA保留隨時以其他優惠取代之權利。而該優惠之價值及種類可能與此推廣活動所提供的優惠不同。如對本推廣活動有任何爭議，AIA 保留最終決定權。

其他注意事項：

1. 財務策劃顧問須提醒客戶人壽保險保單屬長期的保險合約，其設計及宗旨為保障人的壽命，通常涉及較長年期。客戶應根據自身的保障需要和保費負擔能力投保適合的保險產品。
2. 財務策劃顧問不應以此限時禮遇作客戶投保之誘因，及影響客戶作出知情的投保決定。財務策劃顧問向客戶推介產品前須進行財務需要分析，以評估客戶的需要及承擔能力。客戶須根據自己的需要及承擔能力以決定保費。
3. **香港及澳門財務策劃顧問只能於所屬營業牌照境內進行受規管活動。所有銷售活動及投保申請必須在香港及澳門境內進行**。
4. 財務策劃顧問必須遵守"**為抵港抵澳內地人士銷售保險業務的營運指引**"及"**抵港抵澳內地人士認證手續之工作流程**"。
5. 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。如是，請勿在獲取客戶明確同意前進行直接促銷(包括促銷推廣活動的優惠)。
6. 財務策劃顧問必須根據客戶實際需要而建議合適產品。如該產品屬於須要完成財務需要分析之產品財務策劃顧問必須於進行產品推介或銷售前與客戶完成相關之財務需要分析。
7. 財務策劃顧問必須清楚理解產品特色，並在客戶查詢時提供正確之產品資訊，及與產品相關連的風險及主要不受保事項等。

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Appendix 2: 2024 Q2 On Your Side Plan Series Limited Time Offer Promotion Campaign Terms and Conditions

1. The Promotion Campaign is organized by the Hong Kong Branch and/or Macau Branch of AIA International Limited (Incorporated in Bermuda with limited liability) ("AIA"). The promotional period of this Promotion is from 1 April 2024 to 30 Jun 2024, both dates inclusive ("Promotional Period"), and the new policy must be applied and submitted within the Promotional Period (based on application date and submission date) and issued on or before 31 August 2024.
2. This Offer is not applicable to plan conversion cases (including basic plans or riders, if applicable), regardless of plan conversion from other insurance plans to the promotional insurance plans or plan conversion from the promotional insurance plans to other insurance plans.
3. Selected customers successfully apply for new On Your Side Plan Series with at least US$21,000 or above first year annualized premium during the Promotional Period (Based on the original premium price before the premium discount or premium refund) are entitled to a free designated health check-up provided by our designated third-party service provider (valued at HK$1,000) ("Reward").
4. Each eligible policy must be at least US$21,000 or above first year annualized premium, if selected customers apply for more than one policy during the promotion period, each eligible customer can receive the reward once.
5. Customers must provide valid email address to AIA for reward redemption otherwise the winners may be disqualified for the campaign.
6. Upon the issuance of an eligible new policy during the Promotional Period, the Reward will be sent to the eligible policyholder's email by 30 Sep 2024. The eligible new policy must still be in force at the time of issuance of the Reward, otherwise the customer's eligibility for the Reward will be forfeited.
7. The designated third-party service provider is a Hong Kong institution. The Reward is provided by the designated third-party service provider and only available in Hong Kong and is only applicable to eligible customer who is aged 18 or above. The Reward entitlement can be transferred to other eligible person, but is not exchangeable for cash or any other treatments or goods.
8. The Reward shall be invalid after the expiry date and will become void once used. No replacements will be issued if lost.
9. AIA is not the manufacturer/supplier of the Reward and shall have no obligation and liability in any issues that arise from the Reward. Any disputes arising from the Reward shall be resolved between the participants and the manufacturer / supplier directly. The use of the Reward is subject to terms and conditions. For details of how to use the Reward, please refer to the relevant terms and conditions as set by the manufacturer / supplier.
10. This promotion is not applicable to those plans change cases (basic plans or riders, if applicable) from other insurance plans to the insurance plans in this promotion.
11. The Reward and the respective redemption period are subject to the terms and conditions determined by the supplier. Please refer to the relevant terms and conditions for details about the Reward usage. AIA is not the supplier of the Reward and shall not be responsible or liable for the Reward. Any disputes arising from the Reward shall be resolved by the customer and the supplier directly.
12. AIA reserves the right to change any terms and conditions of this promotion without advance notices. All Promotion Offers are valid only when the promoted insurance products are available for application. In the event of any disputes, AIA's decision shall be final and conclusive.

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Memo

Other Points to Note:

1. Financial planners should remind customers that life insurance policies are long-term contracts of insurance, designed and intended to be in force over multiple years of a person's life. Customers should apply suitable insurance products based on their own protection needs and affordability.
2. Financial planners should not use the Limited Time Offer as the incentive for attracting customers to apply for an insurance plan and should not be used to distract customers from making an informed decision on whether or not to purchase the product. Financial planners must conduct financial needs analysis to assess the customers' needs and affordability before making product recommendation. Customers should decide the premium based on their needs and affordability.
3. This campaign can only be promoted within Hong Kong and Macau territory according to the agent's relevant license. All solicitation activities and insurance application must be conducted in Hong Kong and Macau territory.
4. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants / Policyowner from MCV Business" and "Guidelines for Sales and Marketing to MCV Business prospects".
5. Before contacting the policyholder, please check whether the policyholder is on the opt-out list or not. If yes, please do not conduct direct marketing before obtaining explicit consent from customers (including the promotional activities).
6. Financial Planners must recommend product to customers based on the customer's actual need. If the product concerned requires the completion of Financial Needs Analysis, Financial Planners must complete such analysis with customers before product recommendation / solicitation.
7. Financial Planners must familiarize with the product features, and clearly explain the key product features, risks and exclusions to customers upon receipt of customers' enquiries.

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附錄 3: 推廣電郵(會於稍後更新以供參考)
Appendix 3: Promotion eDM (to be updated for reference)

於 2024 年 4 月 26 日起開始發放給香港(Opt-in)客戶及澳門(Opt-in)客戶
to be blasted starting HK (Opt-in) and Macau (Opt-in) customers from 26 April 2024



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