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AIA Hong Kong
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183 Electric Road
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Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / SDDs / DDs / MICs / Agency Leaders / All Financial Planners (Hong Kong and Macau)	From:	Jim Jan Zen Amelie Shen
Copy:	Mr. Alger Fung / Macau CEO / All Department Heads / ABDD Executives / CSBD Executives	Dept:	Corporate Solutions
Date:	17 April 2024	Total pages:	15
Subject:	(A240429) **2025 企業業務海外會議 — 東京之旅** **2025 Corporate Solutions Overseas Convention – Tokyo**		

我們誠意推出 **2025 企業業務海外會議**，以獎勵香港及澳門區內表現傑出的企業業務營業同事，今年更特別**新增全新團體保險**及**個人自選保障方案（IVS）出席名額**，務求在此會議中上可以同時表揚所有企業業務範疇的營業精英，以及凸顯 IVS 業務之重要性。

此外，我們亦徇眾要求，首次破天荒採用**「達標即獲出席名額」**的競賽形式，營業同事只需於組別 A-D 中達到**任何一個子組別項目的 100% 業績要求**，將會獲邀出席 2025 企業業務海外會議，**不設名額上限**。

本競賽更特設兩項排名賽，分別為組別 E 之**「新晉財務策劃顧問排名賽」**及組別 F 之**「IVS 傑出營業精英排名賽」**，以讓表現卓越的新入職營業同事提早感受出席企業業務海外會議的鼓舞氣氛及表揚開拓 IVS 業務出色的營業精英。

為鼓勵更多財務策劃顧問打造更多退休金個人業務個案數目，從而擴闊客戶群造就後續 IVS 銷售，**競賽中所有財務策劃顧問級別於 2024 年 4 月內成功完成之退休金個人業務個案數目將獲雙倍計算。**千萬不要錯過於本月獲雙倍計算的機會！

有關獎項詳情，請參閱附件。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！

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We are pleased to announce the launch of **2025 Corporate Solution Overseas Convention** to honour the outstanding Corporate Solutions producers in Hong Kong and Macau. This year, **group insurance** and **individual voluntary solutions (IVS) attendance quotas have been specially added** to ensure that elite producers in all Corporate Solutions areas can be commended at this convention and the importance of the IVS business can be highlighted.

What's more, due to popular demand, we have adopted the **"Quota Buster"** contest format for the first time. If producers can **successfully meet the 100% performance requirements of any sub-categories in Category A-D**, they will be invited to attend the 2025 Corporate Solutions Overseas Conference, **with no quota limit**.

The Contest also has 2 ranking challenges, namely the **"Ranking Challenge for Newly Jointed Financial Planners"** for Group E and **"Ranking Challenge for IVS Top Producers"** for Group F, allowing newly jointed producers with outstanding performance to experience the encouraging atmosphere of Corporate Solutions Overseas Convention earlier and recognising the top producers who have outstanding achievements in developing IVS business.

To motivate more producers to generate more retail pension cases, creating a wider client base for subsequent IVS sales, **all retail pension cases successfully completed in the month of April 2024 will be double counted for all Financial Planner levels in the contest**. Don't miss your chance of having double count for this month!

Please refer to the Appendix for the awards details. If you have any questions, please contact your designated CSBD Agency executives/IVS Team.

We wish you every success!

Yours faithfully,

Jim Jan Zen
Chief Agency Officer Agency Distribution
Hong Kong and Macau

Amelie Shen
Chief Corporate Solutions Officer
AIA Hong Kong and Macau

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2025 企業業務海外會議

目的地： 日本東京（4 日 3 夜）
競賽日期： 2024 年 3 月 1 日至 2025 年 2 月 28 日
競賽對象： 本競賽主要分為 3 個主要級別，每級別均有指定競賽對象。

級別	合資格營業同事
財務策劃顧問 – 個人業績	所有財務策劃顧問、營業主管及區域總監
營業主管 – 營業組別業績	所有營業主管（區域總監除外）
區域總監 – 區域業績	所有區域總監或以上

1) 競賽組別及要求定義

本競賽共分為下述 6 個組別：

A：退休金（個人業務）
B：退休金（企業業務）
C：團體保險（新業務）
D：團體保險（新生意 + 續保生意）
達標即獲出席名額

E：新晉財務策劃顧問
F：IVS 傑出營業精英
排名賽

每個組別均由多個子組別所組成，而每個子組別則結合了核心業務 ANP [組別 A-D 及 F] 或首年佣金（FYC）[組別 F] 及個案數目和 IVS 保單數目要求，並分為 3 個級別（除組別 E 只適用於新入職財務策劃顧問）。於競賽期內，營業同事只需成功**於組別 A-D 中達到任何一個子組別項目的 100% 業績要求**，可獲邀出席「企業業務海外會議 2025」。

營業同事只能於每個組別中達到最多一個子組別項目作為業績計算，即是指同一組別中只有一個子組別項目可獲計算業績。如果營業同事於同一組別中達到 2 個或以上子組別項目的要求，**業績達標率最高的子組別將獲計算**。例如：如果營業同事同時達到 A2 的 200% 業績要求和 A5 的 100% 業績要求，則以 A2 的 200% 業績達標率為最終計算結果。

組別 A 及 B：

100% 退休金業績要求

組別	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
A. 退休金 個人業務	財務策劃顧問 – 個人業績	A1	625,000	不適用	50★	18
		A2	500,000		50★	24
	營業主管 – 營業組別業績	A3	1,250,000		150	60
		A4	1,000,000		150	90
	區域總監 – 區域業績	A5	2,500,000		500	200
		A6	2,000,000		500	300
B. 退休金 企業業務	財務策劃顧問 – 個人業績	B1	不適用	1,250,000	6★	12
		B2		1,000,000	6★	18
	營業主管 – 營業組別業績	B3		2,500,000	50	48
		B4		2,000,000	50	72
	區域總監 – 區域業績	B5		5,000,000	150	200
		B6		4,000,000	150	300

★個人業務個案數目於 2024 年 4 月獲 2 倍計算

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[AIA – INTERNAL]

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200% 退休金業績要求：（只適用於財務策劃顧問級別）

組別	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
A. 退休金 個人業務	財務策劃顧問 – 個人業績	A1	1,250,000	N/A	50★	18
		A2	1,000,000		50★	24
B. 退休金 企業業務	財務策劃顧問 – 個人業績	B1	N/A	2,500,000	6★	12
		B2		2,000,000	6★	18

★個人業務個案數目於 2024 年 4 月獲 2 倍計算

300% 退休金業績要求：（只適用於財務策劃顧問級別）

組別	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
A. 退休金 個人業務	財務策劃顧問 – 個人業績	A1	1,875,000	N/A	50★	18
		A2	1,500,000		50★	24
B. 退休金 企業業務	財務策劃顧問 – 個人業績	B1	N/A	3,750,000	6★	12
		B2		3,000,000	6★	18

★個人業務個案數目於 2024 年 4 月獲 2 倍計算

組別 C 及 D：

100% 團體保險業績要求

組別	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
C. 團體保險 新生意	財務策劃顧問 – 個人業績	C1	625,000	不適用	2	12
		C2	500,000		1	15
	營業主管 – 營業組別業績	C3	1,250,000		6	40
		C4	1,000,000		4	48
	區域總監 – 區域業績	C5	2,500,000		12	400
		C6	2,000,000		8	480
D. 團體保險 新生意 + 續保生意	財務策劃顧問 – 個人業績	D1	不適用	1,875,000	1	24
	營業主管 – 營業組別業績	D2		3,750,000	4	60
	區域總監 – 區域業績	D3		7,500,000	8	400

200% 團體保險業績要求（只適用於財務策劃顧問級別）

組別	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
C. 團體保險 新生意	財務策劃顧問 – 個人業績	C1	1,250,000	N/A	4	24
		C2	1,000,000		2	30
D. 團體保險 新生意 + 續保生意	財務策劃顧問 – 個人業績	D1	N/A	3,750,000	2	48

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300% 團體保險業績要求（只適用於財務策劃顧問級別）

組別	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
C. 團體保險新生意	財務策劃顧問 – 個人業績	C1	1,875,000	N/A	6	36
		C2	1,500,000		3	45
D. 團體保險新生意 + 續保生意	財務策劃顧問 – 個人業績	D1	N/A	5,625,000	3	72

組別 E：新晉財務策劃顧問排名賽^

為鼓勵新入職財務策劃顧問拓展企業業務，特設競賽**要求較低**的組別，讓表現卓越的營業同事提早感受出席企業業務海外會議的鼓舞氣氛。於競賽期內，新晉營業同事只要達到以下**任何一個子組別項目的 100% 業績要求及首 3 名次**，可獲邀出席「企業業務海外會議 2025」。

營業同事只能達到以下最多一個子組別項目作為業績計算，即是指每一組別中只有一個子組別項目可獲計算業績。如果營業同事達到以下 2 個或以上子組別項目的要求，最終結果將以較高排名為先，其後則以較高業績達標率為先。

100% 退休金業績要求：

組別 E	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
退休金個人業務	**首 3 名**新晉財務策劃顧問 – 個人業績	E1	312,500	不適用	25	9
退休金企業業務	**首 3 名**新晉財務策劃顧問 – 個人業績	E2	不適用	625,000	3	6

- 競賽結果將根據以下成績排名：核心業務 ANP > 個人業務個案數目 > IVS 保單數目。

100% 團體保險業績要求：

組別 E	級別	子組別項目	得獎者必須符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
團體保險新生意	**首 3 名**新晉財務策劃顧問 – 個人業績	E3	312,500	不適用	2	6

- 競賽結果將根據以下成績排名：核心業務 ANP > 新團體保險保單數目 > IVS 保單數目。

^新晉營業同事是指於 2024 年 1 月 1 日起計，其首次加入 AIA 的時間不超過 24 個月之營業同事。

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組別 F：個人自選保障方案（IVS）營業精英排名賽

為鼓勵營業同事全面拓展 IVS 業務，特別增加 **23 個會議席位**，以表揚 IVS 業績卓越之營業精英。於競賽期內，營業同事只要達到以下**任何一個子組別項目的 100% 業績要求及相應名次**，可獲邀出席「企業業務海外會議 2025」。

營業同事只能達到以下最多一個子組別項目作為業績計算，即是指每一組別中只有一個子組別項目可獲計算業績。如果營業同事達到以下 2 個或以上子組別項目的要求，最終結果將以較高級別為先。

100% IVS 業績要求

組別 F	級別	子組別項目	得獎者必須符合下列每項最低要求	
			IVS 保單數目 6-12	總 IVS FYC 6-12 (HK$)
IVS 業務	**首 15 名**財務策劃顧問 – 個人業績取得**最高 IVS 保單數目**	F1	24	280,000
	首 5 名營業主管 – 營業組別業績取得**最高 IVS 保單數目**	F2	90	700,000
	首 3 名區域總監 – 區域業績取得**最高 IVS 保單數目**	F3	300	1,750,000

- 競賽結果將根據以下成績排名：IVS 保單數目 > 總 IVS FYC

2) 獎賞：

每名合資格出席「企業業務海外會議 2025」之得獎者**可透過成功於組別 A-D 中完成一個子組別項目**（達到 100% 至 300% 業績要求）**或於組別 E & F 中達到** 100% 業績要求及**相應名次而獲得最多一個會議席位**。如果營業同事於**多個組別中達到 100% 業績要求，則可以將業績累積計算**，以獲取更高達標組別資格及更多獎賞，並以 300% 達標組別為上限。請參考以下示例以瞭解不同的業績累計方法。

達標組別	合資格獲業績累積計算的組別	可邀請嘉賓數目	來回團體機票	酒店住宿（4 日 3 夜）
100%	組別 A 至 F	不適用	經濟客位 1 張	雙人房（與另一位得獎者各佔半房）
200%*				**單人房 1 間**
300%**		1 位	經濟客位 2 張	**雙人房 1 間**（與其嘉賓同房）

*200% 業績要求 = 指定子組別項目 100% 業績要求之 2 倍或於 2 個競賽組別中 2 個子組別項目之累積業績
**300% 業績要求 = 指定子組別項目 100% 業績要求之 3 倍或於 2 個或以上競賽組別中不同子組別項目之累積業績

示例	職銜	組別						實際累計業績	合資格達標組別
		A	B	C	D	E	F		
1	財務策劃顧問	~~A1 (100%)~~ A2 (200%)				E1 (Top 3)	F1 (Top 15)	400%	300%
2	財務策劃顧問	A1 (100%)	B2 (100%)					200%	200%
3	資深分區經理	A1 (200%) ~~A3 (100%)~~	B4 (100%)				F2 (Top 5)	400%	300%
4	資深區域經理		B3 (100%)		D2 (100%)		F1 (Top 3)	300%	300%
5	區域總監	A2 (200%)		C5 (100%)				300%	300%
6	資深區域總監	A5 (100%)	B6 (100%)	C5 (100%)				300%	300%

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3) 升級商務艙特別排名賽 [17]

組別 A-D 及 F 組之得獎者將符合資格參加以下的特別排名賽：

組別	級別	挑戰項目	相應挑戰項目 ANP 排名	獎賞
A. 退休金 個人業務	財務策劃顧問 – 個人業績	A1 & A2	首 1 名 （共 15 個名額）	來回機票 升級至商務客位
	營業主管 – 營業組別業績	A3 & A4		
	區域總監 – 區域業績	A5 & A6		
B. 退休金 企業業務	財務策劃顧問 – 個人業績	B1 & B2		
	營業主管 – 營業組別業績	B3 & B4		
	區域總監 – 區域業績	B5 & B6		
C. 團體保險 新生意	財務策劃顧問 – 個人業績	C1 & C2		
	營業主管 – 營業組別業績	C3 & C4		
	區域總監 – 區域業績	C5 & C6		
D. 團體保險 新生意 + 續保生意	財務策劃顧問 – 個人業績	D1		
	營業主管 – 營業組別業績	D2		
	區域總監 – 區域業績	D3		
F. IVS 業務	財務策劃顧問 – 個人業績	F1		
	營業主管 – 營業組別業績	F2		
	區域總監 – 區域業績	F3		

一般規則及要求：

1) 退休金個人業務 ANP 之定義

適用於香港區：

- 退休金個人業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的「休悠樂」計劃、客戶尊享強積金個人賬戶計劃、AIA 強積金可扣稅自願性供款（「TVC」）計劃及自僱人士計劃之首年供款及由其他受託人轉入相關資產之 10%，並須於 2025 年 2 月 28 日或之前入賬。強積金可扣稅自願性供款計劃之首年供款及資產轉移各自的計算上限均為 ANP HK$60,000，而自僱人士向友邦強積金計劃所作之首年供款及資產轉移計算上限則為 ANP HK$120,000。

適用於澳門區：

- 退休金個人業務 ANP 包括於競賽期內成功由 AIA 企業業務為客戶處理的首年供款及由其他基金管理實體 / 澳門政府管理子賬戶之央積金和私退金轉入相關資產之 10%，並須於 2025 年 2 月 28 日或之前入賬

2) 退休金企業業務 ANP 之定義。

適用於香港區：

- 退休金企業業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的強積金僱主計劃（MPF）及職業退休計劃（ORSO）之首年供款及由其他受託人轉入相關資產之 10%。

適用於澳門區：

- 退休金企業業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的首年供款及由其他基金管理實體 / 澳門政府管理子賬戶之非強制性中央公積金（「央積金」）僱主計劃和澳門私人退休金（「私退金」）僱主計劃轉入相關資產之 10%。

3) 如果申請屬共同個案（即個案由 2 名或以上營業同事共同完成），每名營業同事獲計算之 ANP 將按比例分配。

4) **適用於香港區：**合資格個案（UID）是指於競賽期內就自僱人士計劃、「休悠樂」計劃、客戶尊享強積金個人帳戶計劃及強積金可扣稅自願性供款計劃所處理之「退休金個人個案」。

適用於澳門區：合資格個案（UID）是指於競賽期內就央積金個人計劃所處理之「退休金個人個案」。如個案數目相同，則以 ANP 排名計算。

5) 如果申請屬共同個案（即個案由 2 名營業同事共同完成），每名營業同事將獲計算 0.5 宗個案，且個案不會以四捨五入方式計算。

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6) 「 個人自選保障方案 」 保單只計算企業業務成員以保單持有人或受保人身份經以下途徑購買之全新個人保單或指定保單 (包括：「友心意」醫療保障計劃 及「意安心升級保障」) ：
   - 強積金 / 退休金個人賬戶成員：經現有強積金 / 退休金個人帳戶之財務策劃顧問購買
   - 強積金 / 退休金企業成員：經現有負責該強積金 / 退休金企業帳戶之財務策劃顧問，或其同一營業單位之財務策劃顧問購買
   - 團體保險計劃成員：經由現有負責該團體保險計劃之財務策劃顧問，或其同一營業單位之財務策劃顧問購買
7) 「個人自選保障方案」保單持有人或受保人必須於投保及保單繕發時仍然為相關強積金 / 退休金 / 團體保險成員。
8) 合資格「個人自選保障方案」保單只計算於競賽期內經 iPoS 遞交及獲繕發之保單。
9) 若營業同事於競賽期之前已遞交相關保單 / 相關保單已獲繕發，並於競賽期內撤回投保申請 / 取消相關保單，其後再次投保相同產品計劃，相關 FYC 將不獲計算。
10) 所有由現有保單轉換 / 退保後由同一受保人或同一持有人持有之保單的 FYC 將不獲計算。
11) 若保單由兩位或以上營業同事共同完成，相關 FYC 及保單數目將按比例平均分配，而保單數目不會以四捨五入方式計算。
12) 同一受保人於競賽期內投保同一基本計劃及同一保費繳付年期之所有新保單，將以一張保單計算。
13) 只計算於競賽日期內成功繳付保費之團體保險新生意 ANP (不包括保險徵費) ，包括度身訂造計劃及套裝計劃 (惟原有保單轉換、僱員自選產品、LAUGHING「自選牙科保障計劃」、澳門摯開心保障計劃及附加額外保障計劃除外) 。
14) 只計算於競賽日期內成功繳付保費之團體保險新生意 ANP 及團體保險續保生意增長 ANP (不包括保險徵費) ，包括度身訂造計劃及套裝計劃 （惟原有保單轉換、僱員自選產品、LAUGHING「自選牙科保障計劃」、澳門摯開心保障計劃及附加額外保障計劃除外) 。
15) 合資格的團體保險新生意保單必須於競賽日期內獲成功繳付首年保費。
16) 如果合資格團體保險保單屬共同個案 (即個案由 2 名或以上營業同事共同完成) ，同一保單號碼的個案將獲平均分配給每名營業同事，且個案數目將不會以四捨五入方式計算。如果有關獎項以 ANP 計算，每名營業同事獲計算之 ANP 將按比例分配。擁有同一保單編號的團體保險個案，將被視作同一個案計算。
17) 營業同事最多只能於「升級商務艙特別排名賽」中獲獎一次。若得獎者同時於 2 個或以上子組別中名列榜首，將以較高級別獎項為先，其後則以較高業績 (達標率) 的子組別獎項為先；而該得獎者所獲的其他獎項將**不會**由相應子組別的下一位合資格者後補獲取。
18) 在任何情況下，營業同事最多只能於本競賽中取得 300% 達標組別一次。
19) 營業同事需繳付香港 / 澳門及會議目的地相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營業同事的公司出糧戶口內扣除。
20) 營業同事遞交保單申請予 AIA，應預留充足時間以確保有關申請已於截數前由 AIA 及 / 或已授權之單位收妥。
21) 營業同事進行銷售時必須根據客戶的需要及保費負擔能力作評估，從而介紹適合的保險產品，不得因獎項而對客戶作特定銷售建議。
22) 競賽結果以保單冷靜期後作調整為準。AIA 保留就調整後之排名結果及就任何違規銷售行為追討已發放獎賞之權利。
23) 所有獲獎者必須於獎項及嘉許發放時仍與 AIA 保持有效合約關係。獎項及嘉許不可轉讓及轉換現金。
24) 友邦保留隨時修改本競賽活動規則之權利，恕不另行通知。如有任何爭議，友邦保留最終決定權。

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2025 Corporate Solutions Overseas Convention

Destination: Tokyo, Japan (4-day/3-night)
Contest Period: 1 March 2024 – 28 February 2025
Eligibility: The Contest is divided into 3 major levels, with designated producers for each level.

Level	Eligible Producers
Financial Planner – by individual production	All Financial Planners, Agency Leaders and District Directors
Agency Leader – by agency production	All Agency Leaders, except District Directors
District Director – by district production	All District Directors or above

1) Contest Categories and Definition of Requirements

The Contest is divided into **6 categories** as described below:

A: Pension (Retail Business)
B: Pension (Corporate Business)
C: Group Insurance (New Business)
D: Group Insurance (New + Renewal Business)
E: Newly Jointed Financial Planner
F: IVS Top Producer

A–D: Quota Buster
E–F: Ranking Challenge

Each category is composed of sub-categories according to a combination of core business ANP [Category A-D and F] or first year commission (FYC) [Category F] and case count and IVS case count requirements, at three levels (except Category E is solely for newly joiner). Producers who can **meet 100% requirements for any sub-categories in Category A-D** within the Contest Period will be invited to attend the "2025 Corporate Solutions Overseas Convention".

Producers can ONLY attain one sub-category for each category for achievement calculation, which means that ONLY one sub-category of each category will be counted for achievement. If a producer can meet the requirements for 2 or more sub-categories within the same category, **the sub-category with the highest achievement rate will be counted**. For example, if a producer meets 200% requirements for A2 and 100% requirements for A5 at the same time, the 200% achievement rate for A2 will be counted as final result.

Category A and B:

100% Pension Requirements

Category	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total Retail ANP[1,3] (HK$)	Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	IVS Case Count[6-12]
A. Pension Retail Business	Financial Planner – by individual production	A1	625,000	N/A	50★	18
		A2	500,000		50★	24
	Agency Leader – by agency production	A3	1,250,000		150	60
		A4	1,000,000		150	90
	District Director – by district production	A5	2,500,000		500	200
		A6	2,000,000		500	300
B. Pension Corporate Business	Financial Planner – by individual production	B1	N/A	1,250,000	6★	12
		B2		1,000,000	6★	18
	Agency Leader – by agency production	B3		2,500,000	50	48
		B4		2,000,000	50	72
	District Director – by district production	B5		5,000,000	150	200
		B6		4,000,000	150	300

★Retail case count will be doubled for April 2024

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200% Pension Requirements – Only applicable to Financial Planner Level

Category	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total Retail ANP[1,3] (HK$)	Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	IVS Case Count[6-12]
A. Pension Retail Business	Financial Planner – by individual production	A1	1,250,000	N/A	50★	18
		A2	1,000,000		50★	24
B. Pension Corporate Business	Financial Planner – by individual production	B1	N/A	2,500,000	6★	12
		B2		2,000,000	6★	18

★Retail case count will be doubled for April 2024

300% Pension Requirements – Only applicable to Financial Planner Level

Category	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total Retail ANP[1,3] (HK$)	Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	IVS Case Count[6-12]
A. Pension Retail Business	Financial Planner – by individual production	A1	1,875,000	N/A	50★	18
		A2	1,500,000		50★	24
B. Pension Corporate Business	Financial Planner – by individual production	B1	N/A	3,750,000	6★	12
		B2		3,000,000	6★	18

★Retail case count will be doubled for April 2024

Category C and D:

100% Group Insurance Requirements

Category	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	New Group Insurance Case Count[16]	IVS Case Count[6-12]
C. Group Insurance New Business	Financial Planner – by individual production	C1	625,000	N/A	2	12
		C2	500,000		1	15
	Agency Leader – by agency production	C3	1,250,000		6	40
		C4	1,000,000		4	48
	District Director – by district production	C5	2,500,000		12	400
		C6	2,000,000		8	480
D. Group Insurance New + Renew Business	Financial Planner – by individual production	D1	N/A	1,875,000	1	24
	Agency Leader – by agency production	D2		3,750,000	4	60
	District Director – by district production	D3		7,500,000	8	400

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200% Group Insurance Requirements – Only applicable to Financial Planner Level

Category	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	New Group Insurance Case Count[16]	IVS Case Count[6-12]
C. Group Insurance New Business	Financial Planner – by individual production	C1	1,250,000	N/A	4	24
		C2	1,000,000		2	30
D. Group Insurance New + Renew Business	Financial Planner – by individual production	D1	N/A	3,750,000	2	48

300% Group Insurance Requirements – Only applicable to Financial Planner Level

Category	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	New Group Insurance Case Count[16]	IVS Case Count[6-12]
C. Group Insurance New Business	Financial Planner – by individual production	C1	1,875,000	N/A	6	36
		C2	1,500,000		3	45
D. Group Insurance New + Renew Business	Financial Planner – by individual production	D1	N/A	5,625,000	3	72

Category E: Ranking Challenge for Newly Jointed Financial Planners^

To encourage new financial planners to develop their corporate business, a category with **lower requirements** is specially designed to allow newly jointed producers with outstanding performance to experience the encouraging atmosphere of Corporate Solutions Overseas Convention earlier. New producers who can **meet 100% requirements for any sub-categories below and attain Top 3 ranking** within the Contest Period will be invited to attend the "2025 Corporate Solutions Overseas Convention".

Producers can ONLY attain one sub-category below for achievement calculation, which means that ONLY one sub-category of each category will be counted for achievement. If a producer meets the requirements for 2 or more sub-categories below, the final result will be based on the higher ranking first, then followed by the higher achievement rate.

100% Pension Requirements

Category E	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total Retail ANP[1,3] (HK$)	Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	IVS Count Case[6-12]
Pension Retail Business	Top 3 Financial Planner – by individual production	E1	312,500	N/A	25	9
Pension Corporate Business	Top 3 Financial Planner – by individual production	E3	N/A	625,000	3	6

- The results will be ranked by core business ANP first, then by retail case count and finally by IVS case count.

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[AIA – INTERNAL]

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100% Group Insurance Requirements:

Category E	Level	Sub-category #	Qualifiers must meet each of the following minimum requirements			
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	New Group Insurance Case Count[16]	IVS Count Case[6-12]
Group Insurance New Business	Top 3 Financial Planner – by individual production	E5	312,500	N/A	2	6

- The results will be ranked by core business ANP first, then by new group insurance case count and finally by IVS case count.

^New producers refer to producers who have first joined AIA for no more than 24 months prior to 1 January 2024.

Category F: Ranking Challenge for IVS Top Producers

To encourage all producers to expand their IVS business comprehensively, 23 seats were specially added to commend Top IVS producers with outstanding performance. Producers who can meet 100% requirements for any sub-categories below and attain the relevant rankings within the Contest Period will be invited to attend the "2025 Corporate Solutions Overseas Convention".

Producers can ONLY attain one sub-category below for achievement calculation, which means that ONLY one sub-category of each category will be counted for achievement. If a producer meets the requirements for 2 or more sub-categories and attain the relevant rankings below, the final result will be based on the higher-level.

100% IVS Requirements

Category F	Level	Sub-category #	Qualifiers must meet each of the following min. requirements	
			IVS Case Count[6-12]	Total IVS FYC[6-12] (HK$)
IVS Business	Top 15 Financial Planner – Highest IVS Case Count by individual production	F1	24	280,000
	Top 5 Agency Leader – Highest IVS Case Count by agency production	F2	90	700,000
	Top 3 District Director – Highest IVS Case Count by district production	F3	300	1,750,000

- The results will be ranked by IVS case count first, and then by Total IVS FYC.

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

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2) Awards:

Each eligible qualifier will be awarded with **one seat only** to attend the "2025 Corporate Solutions Overseas Convention" by successfully **completing one sub-category in Category A-D** (meet 100%-300% requirements) **or attaining** 100% requirements and **the relevant ranking in Category E & F.** If a producer **meets 100% requirements for multiple categories, the achievement can be accumulated** to attain a higher qualifying group with more awards and is subject to a maximum of 300%. Please refer to the examples below for the different ways of accumulating achievements.

Qualifying Group	Categories Eligible for Cumulative Achievement	Guest Observer	Round-Trip Group Air Ticket	Hotel Accommodation (4-day/3-night)
100%	Category A-F	N/A	Economy Class x 1	Twin room (Sharing between 2 qualifiers)
200%*				**One Single Room**
300%**		1 Person	Economy Class x 2	**One Twin Room** (Sharing with Guest Observer)

*200% Requirements = 2 x 100% Requirements of the specified sub-category or the cumulative achievement of 2 sub-categories in 2 contest categories

**300% Requirements = 3 x 100% Requirements of the specified sub-category or the cumulative achievement of different sub-categories in 2 or more contest categories

Example	Producer Title	Category						Actual Cumulative Achievement	Eligible Qualifying Group
		A	B	C	D	E	F		
1	Financial Planner	~~A1 (100%)~~ A2 (200%)				E1 (Top 3)	F1 (Top 15)	400%	300%
2	Financial Planner	A1 (100%)	B2 (100%)					200%	200%
3	Senior Unit Manager	A1 (200%) ~~A3 (100%)~~	B4 (100%)				F2 (Top 5)	400%	300%
4	District Manager		B3 (100%)		D2 (100%)		F1 (Top 3)	300%	300%
5	District Director	A2 (200%)		C5 (100%)				300%	300%
6	Senior District Director	A5 (100%)	B6 (100%)	C5 (100%)				300%	300%

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3) Special Ranking Challenge for Business Class Upgrade[17]

Qualifiers from Category A-D and F are eligible to enter the below special ranking challenge:

Category	Level	Sub-category #	ANP Ranking of the relevant Sub-category	Award
A. Pension Retail Business	Financial Planner – by individual production	A1 & A2	Top 1 (15 seats in total)	Round-Trip Air Ticket **Upgrade to Business Class**
	Agency Leader – by agency production	A3 & A4		
	District Director – by district production	A5 & A6		
B. Pension Corporate Business	Financial Planner – by individual production	B1 & B2		
	Agency Leader – by agency production	B3 & B4		
	District Director – by district production	B5 & B6		
C. Group Insurance New Business	Financial Planner – by individual production	C1 & C2		
	Agency Leader – by agency production	C3 & C4		
	District Director – by district production	C5 & C6		
D. Group Insurance New + Renew Business	Financial Planner – by individual production	D1		
	Agency Leader – by agency production	D2		
	District Director – by district production	D3		
F. IVS Business	Financial Planner – Highest IVS Case Count by individual production	F1		
	Agency Leader – Highest IVS Case Count by agency production	F2		
	District Director – Highest IVS Case Count by district production	F3		

General Rules and Requirements:

1) The definition of Pension Retail business ANP.

Applicable to Hong Kong:

- Pension Retail business ANP includes the Total First Year Contribution and 10% of relevant ATO transferred from other trustees for AIA MPF Personal Account ("MPFPA"), Preferential Deferred Member ("PDM") account, AIA MPF Tax Deductible Voluntary Contribution Account ("TVC") and Self-Employed Person ("SEP") Plan successfully settled by AIA Corporate Solutions within the Contest Period on or before 28 February 2025. The total crediting limit of First Year Contribution and ATO for each TVC account is HK$60,000 in ANP production per category. The total crediting limit of First Year Contribution and ATO made by each SEP account to the AIA MPF scheme is HK$120,000 in ANP production.

Applicable to Macau:

- Pension Retail business ANP includes the Total First Year Contribution and 10% of relevant ATO from other fund management entities or government-managed sub-accounts of CPF and PPF successfully settled by AIA Corporate Solutions within the Contest Period on or before 28 February 2025.

2) The definition of Pension Corporate business ANP.

Applicable to Hong Kong:

- Pension Corporate business ANP includes the Total First Year Contribution and 10% of relevant Assets Taken Over ("ATO) transferred from other trustees for MPF Employer Plan and ORSO Employer Plan successfully settled by AIA Corporate Solutions within the Contest Period.

Applicable to Macau:

- Pension Corporate business ANP includes the Total First Year Contribution and 10% of relevant ATO from other fund management entities or government-managed sub-accounts of Non-Mandatory Central Provident Fund ("CPF") Scheme Employer Plan and Private Pension Fund ("PPF") Scheme Employer Plan successfully settled by AIA Corporate Solutions within the Contest Period.

3) If the qualified cases are jointly closed by two producers, the ANP allocated for each producer will be shared in proportion.

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4) **Applicable to Hong Kong:** An eligible case (Unique Identification - UID) refers to a "Pension Retail Case" processed for MPFPA account, PDM account, TVC account and SEP Plan during the Contest period. In case the case count number is the same, it will be ranked by ANP production.

   Applicable to Macau: An eligible case (UID) refers to a "Pension Retail Case" processed for central provident fund account during the Contest period. In case the case count number is the same, it will be ranked by ANP production.

5) If the qualified cases are jointly closed by two producers, 0.5 cases will be counted for each producer. Case count calculation will not be rounded-up.

6) Individual Voluntary Solutions (IVS) policy is qualified only if a new personal insurance policy or designated policy (including StepUp Medical Protection Plan 2 and Secure First Plus) is purchased by a Corporate Solutions member as policyholder or insured through the following channels:
   - MPF/pension personal account members: Purchase through the existing financial planner of the MPF/pension personal account.
   - MPF/pension corporate members: Purchase through the existing financial planner currently responsible for the MPF/Pension corporate account, or respective financial planners of the same agency unit.
   - Group insurance plan members: Purchase through the existing financial planner currently responsible for the group insurance account, or respective financial planners of the same agency unit.

7) The policyholder or insured of IVS policy must still be a relevant MPF/pension/group insurance member at the time of application and policy issuance.

8) Eligible IVS policies will only be counted if they are submitted via iPoS and issued within the Contest Period.

9) Financial Planners who have submitted policies/policies issued before the Contest Period and then reapply for the same products with the same insured, the corresponding FYC/policies will NOT be counted.

10) The relevant FYC/policy count of case changed/lapsed from existing policies of the same policyholder or insured will NOT be counted.

11) If the policy is jointly completed by two or more Financial Planners, the relevant FYC/Policy Count will be evenly shared in proportion while Policy Count will not be rounded-up.

12) All new policies purchased under the same insured for the same basic plan and same premium payment period during the Contest Period will be counted as one policy.

13) Only the ANP of Group Insurance new business settled within the Contest Period will be counted (excluding premium levy), including tailor-made plans and packaged plans (excluding conversion from existing policies, employee voluntary plans, LAUGHING, CHEERS Macau and top-up plans).

14) Only the ANP of Group Insurance new business and the ANP growth of Group Insurance renewal business settled within the Contest Period will be counted (excluding premium levy), including tailor-made plans and packaged plans (excluding conversion from existing policies, employee voluntary plans, LAUGHING, CHEERS Macau and top-up plans).

15) Eligible Group Insurance new business policy(ies) must have the first year's premium successfully settled within the Contest Period.

16) If the qualified cases are jointly closed by two or more producers, case count will be evenly shared by each producer under the same policy number. Case count calculation will not be rounded-up accordingly. If the reward is calculated by ANP, the ANP allocated for each producer will be shared proportionally. Group Insurance Case(s) registered under the same policy number will be counted as one Group Insurance Case.

17) Producers can only receive the "Special Ranking Challenge for Business Class Upgrade" award once. If a producer is qualified for Rank 1 for more than one sub-category or level, the higher-level award will be granted first, then followed by the sub-category with higher achievement rate; the other award(s) gained by this qualifier will **NOT** be granted to the next eligible qualifier(s) in the respective sub-category.

18) Producers can only attain the 300% qualifying group once in this Contest under any circumstances.

19) Airport tax and security tax both in Hong Kong/Macau airport and airports of the trip destination are excluded. The required expenses for qualifiers will be debited from qualifiers' Company payroll account automatically after the trip.

20) For case applications submitted to AIA, Financial Planners are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorised vendor before the cut-off time.

21) Financial Planners should make product recommendation based on customer needs and affordability and should not make any award-driven recommendation to customers.

22) The ranking results are subject to adjustments after the policy cooling-off period. AIA reserves the right to retract the rewards based on the adjusted ranking results and any substantiated violation of sales conduct.

23) Qualifiers must be in-force with AIA when the awards and recognitions are presented. The award and recognition are not transferrable and cannot be exchanged for cash.

24) AIA reserves the right to amend this Contest and the rewards at any time without prior notice. In case of any disputes, AIA reserves the right for any final decision.

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