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健康長久好生活

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: 1 April 2024

Total page: 13

Subject: **(A240430)** **[更新] 全民 ACTIVE 全速超越**
[Update] All ACTIVE at Full Speed

第二季度現已開始！讓我們一起鞏固根基，一起擁抱Growth的心態，全速前進，追求更高的目標！公司設立不同級別競賽「**全民ACTIVE 全速超越**」助你全力前進，踏上成功之道：

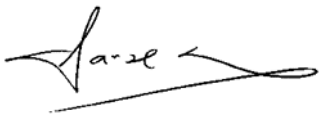
全民ACTIVE：連續活躍並完成特選產品保單，建立良好基礎；
直奔MDRT：加速邁向MDRT，獲取豐厚現金獎賞；
全速超越 成為COT甚至TOT：快人一步達到目標，出發韓國首爾觀看非一般球賽並可獲旅遊現金獎賞！

此季度競賽旅程以不斷超越，再攀高峰為目標，懷著增長Double的雄心進發！讓我們全力以赴，挑戰最高獎賞！

追求卓越 成為客戶首選

有關競賽詳情請參閱下文。

Please refer to the details below.



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



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全民 ACTIVE 全速超越——競賽概覽

競賽資格：

所有營業單位主管及財務策劃顧問（以個人業績計算）

競賽日期：

2024 年 4 月至 5 月（共 2 個月）

全民ACTIVE 全速超越	級別^	級別基本要求: 計算福利之首年佣金 (FYC Benefit)/活躍要求/保單數目	獎賞
全速超越 成為COT 甚至TOT	6	HK$1,000,000	首50名可獲韓國首爾非一般球賽門票 及旅遊現金獎賞
直奔MDRT	5	HK$470,000	現金獎賞HK$28,888
	4	HK$250,000	現金獎賞HK$12,888
	3	HK$120,000	現金獎賞HK$6,088
全民ACTIVE	2	2個月活躍 + 4張指定保單	現金獎賞HK$1,688 + 指定健康保障產品保單額外賞HK$200
	1	2個月活躍 + 2張指定保單	現金獎賞HK$488 + 指定健康保障產品保單額外賞HK$100

備註：

- **^級別 1 至 6 之獎賞不可同時兼得，以較高級別之獎賞為準。**
- 有關各級別競賽詳情，請參閱下文。

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級別(1-2)

連續活躍特選產品多重賞

競賽規則及獎項

於競賽期內達到**2個月活躍***要求及完成以下**指定保單數目**@，達指定級別^要求即可獲得現金獎賞，指定**健康保障產品保單**更可獲額外獎賞：

健康保障產品保單：	**儲蓄保單：**
- **愛伴航 (OYS) 或** - **「尊裕明珠」醫療計劃 (PPP) 或** - **「尊裕」醫療計劃 (PP)** - **「自在自選」危疾保 (AA) 或** - **[友扣稅] AIA 自願醫保計劃 (VHIS)#**	- **「充裕未來•盈尚」(BPV) 或** - **盈御多元貨幣計劃3 (GP3) 或** - **[友扣稅] AIA 延期年金計劃 (ADAP) 或** - **「愛無憂長享計劃5」 (FLCP5)**

級別	**競賽要求**		**現金獎賞**	**指定健康保障產品保單額外獎賞 (只限一次)**
	活躍*月份	**指定保單數目@**		
級別 1	2 個月	2	HK$488	HK$100
級別 2		4	HK$1,688	HK$200

備註：

- *活躍營業代理是指當月內獲成功繕發/生效最少 1 張人壽保單，或 1 張獨立個人意外保險保單，或 1 張 CS-團體保險業務保單，或 1 張 CS-退休金企業業務保單，或 3 張 CS-退休金個人業務保單。
- @保單數目計算指定保單產品之基本計劃**及**附加契約。
- #[友扣稅] AIA 自願醫保計劃 (VHIS) 包括尊裕、尊顯、尊尚、靈活 或 標準計劃 (只限香港)。

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級別(3-5)

Goal for MDRT 現金賞

競賽規則及獎項

於競賽期內完成指定**計算福利之首年佣金 (FYC Benefit)** 要求，將獲得相應之現金獎賞。

級別	計算福利之首年佣金 (FYC Benefit) 要求 (包含特別計算#)	獎賞
級別 3	HK$120,000	現金獎賞 HK$6,088
級別 4	HK$250,000	現金獎賞 HK$12,888
級別 5	HK$470,000	現金獎賞 HK$28,888

更新

#「個人自選保障方案」 (IVS) 及 指定健康保障產品 FYC 特別計算：

- 於 2024 年 4 月至 5 月獲繕發之**「個人自選保障方案」(IVS) 及 指定健康保障產品** FYC 將可獲 **1.2 倍計算**於業績內。如該保單產品均為**「個人自選保障方案」(IVS) 及 指定健康保障產品，只限一次 1.2 倍計算於業績內。**
- 指定健康保障產品包括：
    - 愛伴航 (OYS) 或
    - 「尊裕明珠」醫療計劃 (PPP) 或
    - 「尊裕」醫療計劃 (PP)
    - 「自在自選」危疾保 (AA) 或
    - [友扣稅] AIA 自願醫保計劃 (VHIS)^

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例子：

[A] 實際 FYC Benefit (HK$) [僅包含 IVS /指定健康保障產品未獲特別計算之 FYC]	[B] 2024 年 4 至 5 月完成之 IVS /指定健康保障產品 FYC (HK$)	[A] + [B]*0.2 包含特別計算之 FYC Benefit (HK$)	達標級別
245,000	25,000	250,000 [245,000 + 25,000*0.2]	級別 4
465,000	50,000	475,000 [465,000 + 50,000*0.2]	級別 5

備註：

1. 「個人自選保障方案」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人壽保單或指定保單（包括：「友心意」醫療保障計劃 2 及「意安心升級保障」）：

- 強積金 / 退休金個人帳戶成員：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

2. 「個人自選保障方案」中人壽保險保單或指定保單之保單持有人或受保人必須於保單繕發時仍然為相關強積金 / 退休金 / 團體保險成員。
3. 企業業務成員須於(i) 2024 年 3 月 31 日及投保時為現有友邦強積金/退休金成員 或 (ii) 投保時為現有友邦團體保險成員。
4. ^[友扣稅] AIA 自願醫保計劃 (VHIS) 包括尊裕、尊顯、尊尚、靈活 或 標準計劃 (只限香港)。

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級別(6)

韓國首爾非一般球賽體驗爭奪戰

競賽規則及獎項：

於競賽期內達到計算福利之首年佣金（FYC Benefit）最低要求 及 指定排名之得獎者，將獲得**韓國首爾非一般球賽門票**及**旅遊現金獎賞**。

競賽要求： 以計算福利之首年佣金（FYC Benefit）作排名		獎賞
排名	FYC Benefit 最低要求	
首 50 名	HK$1,000,000	韓國首爾非一般球賽門票 2 張* 及 旅遊現金獎賞 HK$60,000

備註：

1. *獎賞詳情將稍後公佈，如遇特殊情況，公司或會以其他獎賞作替代。
2. 此競賽結果將不接受上訴申請。

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一般規則

1. 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、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 Benefit 之內。
2. 如營業同事於競賽期之前已遞交保單/保單已獲繕發，但於競賽期內撤回投保申請/取消保單，並再次投保相同產品計劃，其保單將不獲計算。
3. 所有由現有保單轉換/退保後同一受保人之保單將不獲計算。
4. 若兩位或以上之營業單位主管/財務策劃顧問共同完成 1 張保單，將平均計算予各人。競賽期完結時，若保單數目總數為點數，數目將下調為整數計算。
5. 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。
6. 營業同事遞交保單申請予 AIA，應預留充足時間確保有關申請已於截數前由 AIA 及/或已授權之單位收妥。
7. 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，不得因獎賞而對客戶作特定銷售建議。
8. 競賽結果以保單冷靜期後作調整為準。AIA 保留就調整後之競賽結果及就任何違規銷售行為追討已發放獎賞之權利。
9. **若保單生效期24個月內出現之斷供或保費減額超過或等於競賽期內人壽及個人意外保險首年佣金 (FYC) 之百份之十五，公司將根據調整後的FYC重新計算相關的花紅金額。無論營業同事當時仍否與AIA持有效合約，若調整前後的花紅金額存在差異，公司將扣除相關花紅差額。**
10. **級別 1 至 6 之獎賞不可同時兼得，以較高級別之獎賞為準。**
11. 所有獲獎者必須於獎賞發放時仍與 AIA 持有效合約。
12. 所有獎賞不可退換或轉換成以現金發放，安排均以 AIA 最終安排為準。
13. 未經公司批准或同意，營業同事不能基於任何目的於社群媒體轉售、贈送門票或就門票舉行抽獎。
14. AIA 保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
15. 如有任何異議，以 AIA 最後決定為準。

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All ACTIVE at Full Speed — Contest Overview

Eligibility:
All financial planners and agency leaders (by personal production)

Contest Period:
April to May 2024 (2 months)

All ACTIVE at Full Speed	Level^	Requirement: FYC Benefit/ No. of active months/ Case Count	Award
Full Speed Ahead Achieve COT or TOT	6	HK$1,000,000	Top 50 qualifiers will be rewarded with match tickets of Extraordinary Football Game in Seoul, Korea and travel cash reward
Go Straight to MDRT	5	HK$470,000	Cash Award HK$28,888
	4	HK$250,000	Cash Award HK$12,088
	3	HK$120,000	Cash Award HK$6,088
All ACTIVE	2	2-month active + 4 selected cases	Cash Award HK$1,688 + Extra Reward of Selected Health Production Products HK$200
	1	2-month active + 2 selected cases	Cash Award HK$488 + Extra Reward of Selected Health Protection Products HK$100

Remarks:
1. ^Awards of Level 1-6 are mutually exclusive, according to whichever is higher.
2. Please refer to the following pages for contest details.

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Level (1-2)

Consecutive Active Selected Product Case Challenge

Contest Rules & Awards

All Agency Leaders & Financial Planners who have achieved **2 months of active producers*** and designated number of **selected products@** listed below within the contest period, will be awarded with respective cash rewards^, whilst **selected Health Protection products** entitles extra cash reward.

Health Protection:	Savings:
- On Your Side Plan (OYS); OR - Privilege Plus Pearl Medical Plan (PPP); OR - Privilege Plus Medical Plan (PP) - AIA Assemble (AA); OR - [Tax Deductible] AIA Voluntary Health Insurance Schemes (VHIS)#	- Bonus Power Vantage (BPV); OR - Global Power Multi-Currency Plan 3 (GP3); OR - [Tax Deductible] AIA Deferred Annuity Plan (ADAP); OR - Forever Love Coupon Plan 5 (FLCP5)

Level	Production Requirement		Cash Reward	Selected Health Protection Products Extra Reward (Rewarded once only)
	Active* Month	Selected Case Number@		
Level 1	2 months	2	HK$488	HK$100
Level 2		4	HK$1,688	HK$200

Remarks:

- *Active Financial Planner refers to financial planners who have at least 1 Approved Life case, or 1 Approved iPA case, or 1 Approved CS-EB case, or 1 Approved CS-Pension Corporate case, or 3 Approved MPF PA cases.
- @Case count includes both basic plans **and** riders.
- #[Tax Deductible] AIA Voluntary Health Insurance Schemes (VHIS) include Privilege Plus, Privilege, Prime, Flexi & Standard Scheme (for Hong Kong only).

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Level (3-5)

Goal for MDRT Cash Award

Contest Rules & Awards:

Producers who achieved designated **FYC Benefit** requirement within contest period, will be rewarded with respective cash reward.

Level	FYC Benefit Requirement (Including special count#)	Award
Level 3	HK$120,000	Cash reward HK$6,088
Level 4	HK$250,000	Cash reward HK$12,888
Level 5	HK$470,000	Cash reward HK$28,888

Update

 # Special count for Individual Voluntary Solutions (IVS) and selected Health Protection Products FYC:

- Individual Voluntary Solutions (IVS) and selected Health Production Products FYC being delivered in April to May 2024 will be 1.2 times special counted. If the policy belongs to both Individual Voluntary Solutions (IVS) and selected Health Production Products, 1.2 times special count can only apply once to the production.
- Selected Health Protection Products:
    - On Your Side Plan (OYS); OR
    - Privilege Plus Pearl Medical Plan (PPP); OR
    - Privilege Plus Medical Plan (PP)
    - AIA Assemble (AA); OR
    - [Tax Deductible] AIA Voluntary Health Insurance Schemes (VHIS)^

Example:

[A] Actual FYC Benefit (HK$) [Included IVS / selected Health Protection Products FYC before special count only]	[B] IVS / selected Health Protection Products FYC achieved in April to May 2024 (HK$)	[A] + [B]*0.2 FYC Benefit included special count (HK$)	Achieved level
245,000	25,000	250,000 [245,000 + 25,000*0.2]	Level 4
465,000	50,000	475,000 [465,000 + 50,000*0.2]	Level 5

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Remarks:

1. Individual Voluntary Solutions (IVS) is qualified only if a new personal life 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 corporate account, or respective financial planners of the same agency unit
2. The policyholder or insured of the life insurance policy or designated policy under Individual Voluntary Solutions (IVS) must still be a relevant MPF/pension/group insurance member when the policy is issued.
3. Corporate Solutions members need to be (i) an existing AIA MPF / Pension member on 31 March 2024 and at the time of application; or (ii) an existing AIA Group Insurance member at the time of application.
4. ^[Tax Deductible] AIA Voluntary Health Insurance Schemes (VHIS) include Privilege Plus, Privilege, Prime, Flexi & Standard Scheme (for Hong Kong only).

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Level (6)

Ranking Challenge for Extraordinary Football Match in Seoul, Korea

Contest Rules & Awards:

Qualifiers who achieved the below minimum FYC Benefit requirement **AND** designated ranking within the contest period, will be rewarded with **match tickets of Extraordinary Football Game in Seoul, Korea** and **travel cash reward**.

Requirement: Ranked by FYC Benefit		Award
Ranking	Minimum FYC Benefit	
Top 50	HK$1,000,000	2 match tickets of Extraordinary Football Game in Seoul, Korea* AND Travel cash reward HK$60,000

Remarks:

1. * Further details will be announced in due course. In the event of unforeseeable circumstances, alternative rewards could be offered as replacement.
2. Appeal is not entertained in this contest.

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General Rules & Regulations:

1. FYC Benefit on all Life, Life A&H Riders, Standalone Life A&H, PA, CS-EB, CS-Pension Corporate and CS-Pension Retail will be counted.
2. Producers who have submitted policies / policies issued before the contest period but withdraw the captioned policy applications / cancel the captioned issued policies during the contest period and then reapply for the same products for the same insured, the corresponding FYC will not be counted.
3. Cases changed / lapsed from existing policies of the same insured will not be counted.
4. Joint policies will be shared evenly among the co-producers. Cases will be counted according to total no. of cases rounding down into an integer after contest completion.
5. Policies under the same insured for the same basic plans and with same premium pay period, which are issued within the contest period will be counted as one case.
6. For case applications submitted to AIA, producers are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorized vendor before the cut-off time.
7. Sales representative should make product recommendations based on customer needs and affordability and should not make any incentive-driven recommendations to customers.
8. The result of the challenge shall be adjusted according to the execution of cooling-off rights by policyowners of the policies. AIA will reserve the right to retract the award based on the result and any substantiated violations of required sales conduct.
9. Should any policies lapsed or premium reduced within 24-policy months, given the amount is greater than or equal to 15% of Life & PA FYC generated within the contest period, the corresponding FYC Bonus will be re-assessed in accordance with the total net FYCB after adjustment. Any adjustment on FYC Bonus amount in the results, will be clawed back regardless the producer is still inforce in AIA or not at the time being.
10. Awards of Level 1-6 are mutually exclusive, according to whichever is higher.
11. Qualifiers must be inforce with AIA at the time the awards are paid out/redeemed.
12. All rewards cannot be converted to cash rebate and the arrangement is subject to AIA's final decision.
13. Reward resale, giveaway or lucky draws via social media for any purpose are prohibited without approval or consent of AIA.
14. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability at any time without prior notice.
15. In the event of dispute, AIA's decision is final and conclusive.

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