AIA Hong Kong
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Memo

Attn.:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only)	**From:**	Vanessa Tan Leo Cheung Angela Lau
Copy:	Mr. Alger Fung / Ms. Alice Liang / Mr. Jim Jan Zen / Mr. Louie Ho / Mr. Pedro Lei / Mr. Chris Lau / All Department Heads / Heads of Agency Division / BPs / Call Centre	**Dept.:**	Proposition Office
Date:	19 April, 2024	**Total pages:**	11 pages

Subject: **A240468** **正式開始接受「新資本投資者入境計劃」下的合資格保單申請**
Officially commencing the acceptance of applications for policies eligible under the New Capital Investment Entrant Scheme

跟進我們之前分別在2024年3月8日及3月28日發出的通告（A240329及 A240352），我們於即日起開始接受新資本投資移民計劃（新 CIES）下的合資格保單申請。

為助各位推廣新 CIES 予潛在客戶，Proposition 團隊準備一系列增值配套服務，全方位協助財務策劃顧問服務潛在客戶，包括新 CIES 入境諮詢服務，子女教育諮詢服務、會計及本地業務開展諮詢服務、財富管理策劃及傳承規劃專責團隊，和「友邦峻宇財富管理中心」；亦特製一本專屬概覽冊，涵蓋最新及關鍵資訊，助您有效介紹相關計劃與 AIA 優勢。

有關新 CIES 的各項安排如下：

「我們」、「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）
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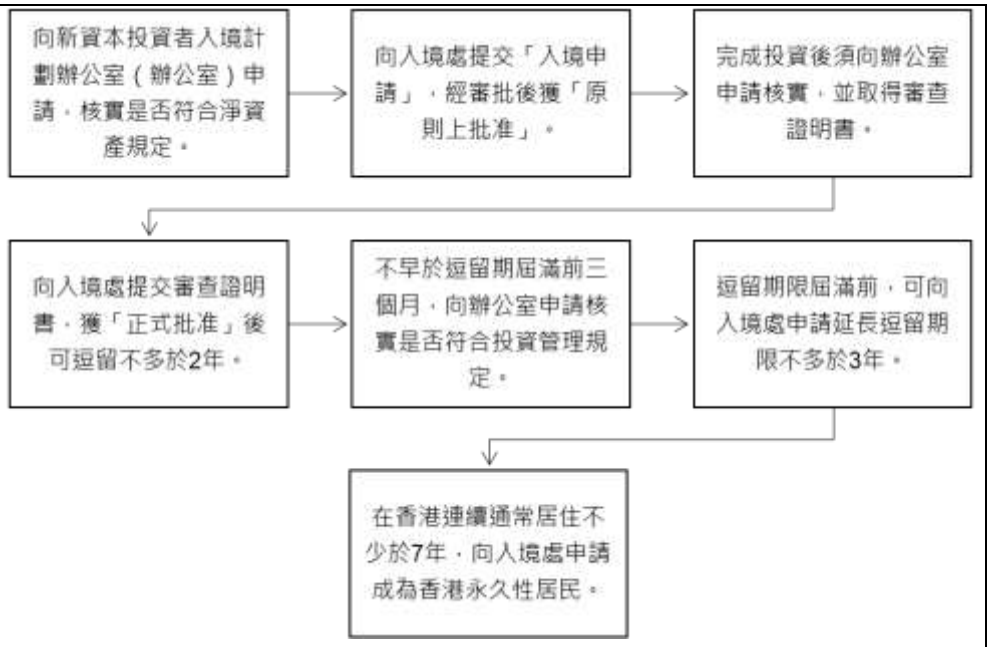
新 CIES 的申請流程	
香港『新資本投資者入境計劃』指引	• 介紹了新 CIES 的背景、營業員支援、遞交新 CIES 下的合資格保單之服務流程和常見問題（FAQs） • 財務策劃顧問可於**2024年4月19日**起登入營業員專頁瀏覽 / 下載有關指引 • 營業員專頁 > 部門資訊 > 財富管理部 > CIES 專區
增值配套服務*	為配合新 CIES 推出，公司已準備全方位協助財務策劃顧問，為**有興趣申請新 CIES 的潛在客戶**準備相關申請手續及全面了解來港定居的相關安排，繼續貫徹以「客戶為中心」的理念，貼心照顧客戶需求，潛在客戶可按個人需要而自行選擇。 **1) 新 CIES 入境諮詢服務** 新 CIES 申請涉及向投資推廣署及入境事務處等部門的申請，新 CIES 申請人可能需要入境諮詢顧問公司協助，根據新 CIES 申請流程提供相關資料及提交申請文件。 **2) 會計及業務開展諮詢服務** 新 CIES 申請將需要合資格的執業會計師協助提交淨資產審查申請及投資規定審查申請。同時，潛在客戶在申請新 CIES 前可能需要考慮將來於香港開展業務，而需要香港企業設立或稅務等相關專業諮詢服務。 3) **子女教育諮詢服務**

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	潛在客戶申請新 CIES 前，若計劃未來與其子女一同來港生活，需要了解本地學制、國際學校選擇，安排子女負笈海外升讀心儀學府等資訊。 **財富管理策劃及傳承規劃專責團隊** 我們的財富管理策劃及傳承規劃專責團隊，夥拍多個國際機構組成的專業顧問團隊，為高淨值客戶以轉介形式提供財富傳承、個人稅務及法律諮詢等服務，為業界首個專為客戶一站式提供多個專業範疇服務。團隊亦已擴大服務範圍，加强支援上述提到之增值配套服務，以滿足有興趣申請新 CIES 的潛在客戶的特定需求。 有關上述增值配套服務的詳情及服務提供方的詳細資料，財務策劃顧問可通過營業員專頁或 AIA SMART 於財富管理部專頁(WMD Corner)中的 CIES 專區瀏覽。 • 營業員專頁 > 部門資訊 > 財富管理部 > CIES 專區 • AIA SMART> 財富管理部專頁> CIES 專區 如有其他相關查詢，請與財富管理策劃及傳承規劃專責團隊聯絡或電郵至 aiahkwealthmgnt@aia.com。 ***重要事項** • ***上述增值配套服務為有興趣申請新 CIES 的潛在客戶而設，由客戶自行決定是否需要，而上述增值配套服務不應與合乎新 CIES 申請的投資相連壽險的銷售活動掛勾。*** • ***上述增值配套服務由相關第三方專業服務供應商提供，並非由 AIA 提供，AIA 僅為有需要之潛在新 CIES 客戶提供相關第三方專業服務供應商之聯絡資料。AIA 僅作為新 CIES 的合資格保單之金融中介機構。*** • ***業務代表不得牽涉於任何服務提供者（如移民顧問、稅務顧問等）與客戶之間之任何服務費用之商討，亦不可向客戶提供任何有關稅務、會計、法律及移民等的諮詢或建議。*** • ***業務代表不可代任何服務提供者向客戶收取任何服務費用。*** • ***如客戶要求介紹顧問服務提供者，業務代表不可以此作為申請任何保單的先決條件，並且業務代表不可將客戶之任何個人資料交付予顧問服務提供者。***
「友邦峻宇財富管理中心」	為配合各位服務潛在客戶以及更有效配合上述貼心服務，於**2024年4月19日起**，財務策劃顧問如需與潛在客戶會面，可特別預約**「友邦峻宇財富管理中**

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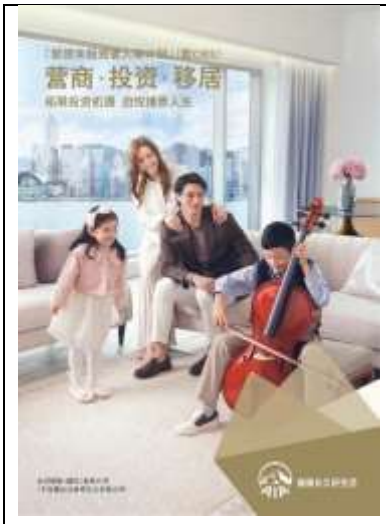
	心」！想了解更多預約詳情，請電郵至友邦峻宇財富管理中心 aia_wm_ctr@aia.com.

「新資本投資者入境計劃」概覽冊	為客戶精心製作概覽冊，掌握有關新 CIES，以及本港、AIA 與投連壽險的優勢。
	
	
	
	簡體中文版：PTA990144.0424
	
	
	
	繁體中文版：PTA990143.0424
	
	• 財務策劃顧問可於**2024年4月19日**起登入營業員專頁及 i 學院(iAcademy) 瀏覽 / 下載有關中文電子版本
	  • 營業員專頁 > 部門資訊 > 財富管理部 > CIES 專區
	  • i 學院 (iAcademy) > 網上學習課程 > 投資相連壽險 > 「新資本投資者入境計劃」
	• 簡體中文印刷版本將於**2024年5月10日**起開始送抵各營業辦事處
	• 財務策劃顧問亦可於**2024年5月10日**起從 PSS 訂購簡體中文印刷版本，編號為 PTA990144.0424

線上學習	• 已於 iAcademy 提供培訓材料，以確保您熟悉處理新 CIES 下的合資格保單申請的準備工作。
	  • i 學院 (iAcademy) > 網上學習 > 投資相連壽險 > 新資本投資者入境計劃
	  • https://www2.aia.com.hk/LMSTrainee/TraineeTraining/TrainingShare/TkwODcyQldNMzg1RzRBNjg4MzVNUlJBMTlFUFBFU0s1U1JQQTE5MDg3M/

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CIES 專區	財務策劃顧問可以登入「**CIES 專區**」以獲得有關新 CIES 的資訊 • 營業員專頁 > 部門資訊 > 財富管理部 > CIES 專區 • AIA SMART> 財富管理部專頁> CIES 專區 內容包括 • 通告及產品資料 • 表格及常見問題 • 銷售支援 • 常用連結 
相關表格	財務策劃顧問可登入營業員專頁瀏覽 / 下載以下相關表格 • 新資本投資者入境計劃授權書 • 金融中介機構協議 - 新資本投資者入境計劃

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	• 客戶委任金融中介機構之聲明 • 新資本投資者入境計劃資料披露同意書 • 新資本投資者入境計劃核對文件清單 • 營業員專頁 > 核保 > 表格
常用連結	• 新資本投資者入境計劃主頁 新資本投資者入境計劃 - 主頁 (newcies.gov.hk) • 證監會「新資本投資者入境計劃」下的合資格集體投資計劃列表 「新資本投資者入境計劃」下的合資格集體投資計劃列表 | 證監會 (sfc.hk)

請注意，此通告是一份內部文件，僅供友邦內部使用及只供參考。閣下不得傳播，分發或流傳此通告予友邦以外的任何第三方。

請將以上訊息傳達予屬下的營業同事，多謝合作！如有任何疑問，請致電我們的熱線(852) 3108 1638 (香港)查詢。

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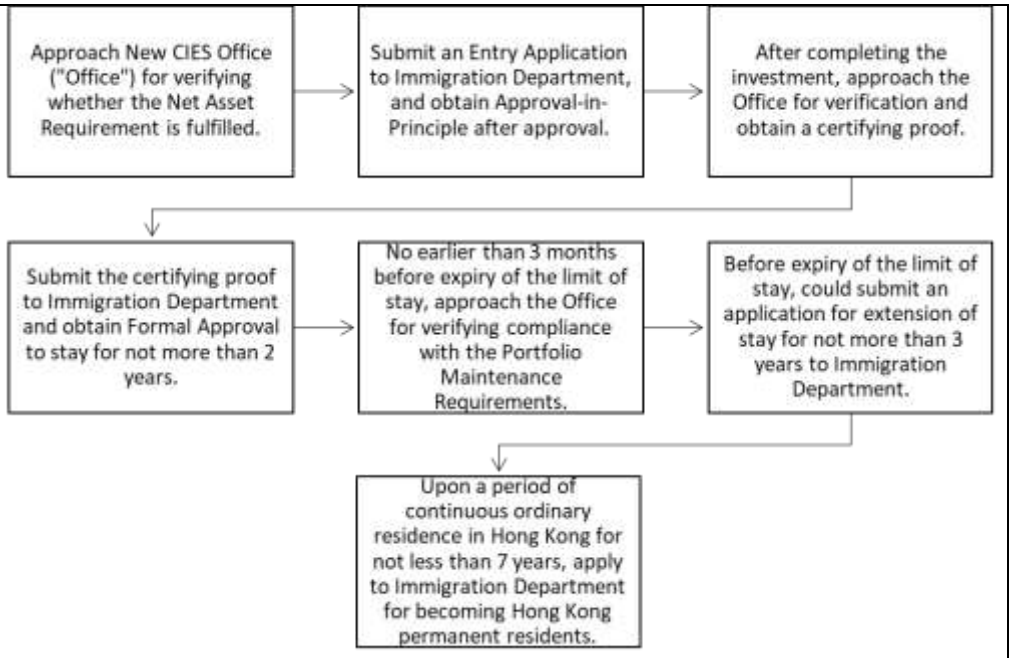
Following up on our previous memo (A240329 and A240352) issued on 8 March and 28 March 2024 respectively, we have commenced accepting applications for policies which are eligible for the New Capital Investment Entrant Scheme (New CIES), effective immediately.

To equip you to promote the New CIES to potential customers, Proposition Team has prepared a series of value-added services to provide comprehensive support to our financial planners in servicing potential customers, including New CIES Immigration Advisory Service, Children Education Advisory Service, Accounting and Local Business Development Consultancy Service, HNW Dedicated Team and AIA Alta Wealth Management Centre. Also, we have tailor-made a booklet that provides an exclusive overview. It covers the latest and key information, helping you introduce the relevant programme and the advantages of AIA.

Below are the details of the arrangements regarding the New CIES:

<table>
<tr><td>Application process flow for the New CIES</td><td>
</td></tr>
<tr><td>Guideline on Hong Kong's New CIES</td><td>• Outlines the background of the New CIES, agent support, service procedures to submit applications for policies which are eligible for the New CIES, and frequently asked questions (FAQs)
• The guideline will be ready for viewing/download by financial planner at eAC on <u>19 April 2024</u>
  • eAC > Departments > Wealth Management Department > CIES Corner</td></tr>
<tr><td>Value-Added Services*</td><td>To accommodate the commencement of New CIES, we have prepared the following Valued-Added Services, to provide comprehensive support to our financial planners in assisting potential customers who are interested in applying the New CIES for the relevant application procedures and to holistically understand details about relocating to Hong Kong. We continue to uphold the "customer-centric" philosophy and take care of our customers' needs attentively. Potential customer may select the services according to his/her own needs.

1) New CIES immigration advisory service</td></tr>
</table>

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New CIES application procedure involves submitting applications to various departments such as InvestHK and Immigration Department. New CIES applicants may require assistance from immigration advisors for providing relevant information and submitting application documents in accordance with the New CIES application procedures.

2) Accounting service

In relation to the process of New CIES application, potential customers will require the assistance of a practising CPA to submit the application for net asset assessment and fulfillment of investment requirements . Additionally, before applying for New CIES, potential customers may need to consider developing business in Hong Kong in the future, which may require services such as establishing corporations in Hong Kong or tax-related professional advisory services.

3) Children Education advisory service

Prior to applying for New CIES, if potential customers plan to reside in Hong Kong with their children in the future, they may need to gain an understanding of the local education system, options for international schools, and information on overseas education for their children.

HNW Dedicated Team

Our HNW dedicated team for Wealth and Succession planning collaborates with a professional advisory team composed of various international professional firms. Through referral arrangements, services such as succession planning, personal taxation and legal consulting are provided to HNW customers, which is the industry's first to offer a one-stop solution for customers, encompassing multiple professional areas. The team has also expanded the range of offering to meet the specific needs of New CIES clients by including the value-added services mentioned above.

For further details of the above value-added services and the service providers, relevant materials will be ready for viewing/download by financial planners via eAC or at the New CIES corner under Wealth Management Department Corner (WMD Corner) of AIA SMART.

- eAC > Departments > Wealth Management Department >CIES corner
- AIA SMART> WMD corner>CIES corner

If you have any further queries, please contact our HNW dedicated team or email to aiahkwealthmgnt@aia.com.

***Important notes**

- *The above value-added services are prepared for potential customers who are interested in applying for the New CIES. It is up to customers to decide on their own whether they need the services. The above-mentioned value-added support services should not be associated with the sales activities of ILAS policies that are qualified for the New CIES application.*

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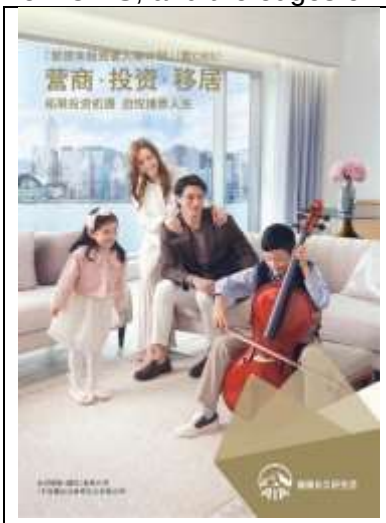
	• *The above value-added services are provided by relevant third-party professional service providers and not provided by AIA. AIA only provides contact information of the third-party professional service providers to the potential customers who are interested in applying for the New CIES. AIA only acts as a financial intermediary for the qualified insurance policies under New CIES.* • *Sales Representatives shall not be involved in any discussions regarding service fees between any service providers (such as immigration consultants, tax consultants, etc.) and customers, nor provide any advice or recommendation to customers, including tax, legal, accounting or immigration advice.* • *Sales Representatives are not allowed to collect any service fees on behalf of any service providers from customers.* • *If customers request an introduction to service providers, Sales Representatives are prohibited to use this as a prerequisite for applying for any insurance policy and are prohibited to provide the customer's personal information to the service providers.*
AIA Alta Wealth Management Centre	To accommodate our valued potential customers and to better facilitate the aforementioned value-added services, starting from April 19, 2024, if financial planners need to meet with potential customers who are interested in applying for the New CIES, they can make special appointments at AIA Alta Wealth Management Centre! For enquiries about the appointment process, please email to aia_wm_ctr@aia.com.

The New Capital Investment Entrant Scheme Booklet	Crafted meticulously for customers, the booklet enables them to keep up with the New CIES, and the edges of Hong Kong, AIA and ILAS.
	
	
	Simplified Chinese Version: PTA990144.0424
	
	
	Traditional Chinese Version: PTA990143.0424
	• The Chinese electronic versions will be ready for viewing/download by financial planner at eAC and iAcademy on **19 April 2024**
	  • eAC > Departments > Wealth Management Department > CIES Corner
	  • iAcademy > E-Learning Training > Investment Linked Insurance > New CIES
	• Simplified Chinese printed version will be delivered to agency offices starting from **10 May 2024**

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	• Simplified Chinese printed version will be ready for order through PSS from **10 May 2024**. The relevant PTA number is PTA990144.0424.

Online Training	• Training materials are made available in iAcademy to ensure you are well-prepared to handle applications for policies which are eligible for the New CIES.
	  • iAcademy > E-Learning Training > Investment Linked Insurance > New Capital Investment Entrant Scheme (New CIES)
	  • https://www2.aia.com.hk/LMSTrainee/TraineeTraining/TrainingShare/TkwODcyQldNMzg1RzRBNjg4MzVNUlJBMTlFUFBFU0s1U1JQQTE5MDg3M/
	

CIES Corner	Financial planner can log on to "**CIES Corner**" to access New CIES related information. • eAC > Departments > Wealth Management Department >CIES corner • AIA SMART> WMD corner>CIES corner Contents include: • Memo & Product Information • Form & FAQs • Sales Support • Useful Links

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Relevant Forms	The relevant forms below are available for viewing/download by financial planner at eAC • New Capital Investment Entrant Scheme Authorisation Letter • Financial Intermediary Agreement - New Capital Investment Entrant Scheme • Customer Declaration for Appointment of Financial Intermediary • Consent Letter for Release of Information for New Capital Investment Entrant Scheme • New Capital Investment Entrant Scheme Checklist • eAC > Underwriting > Forms
Useful Links	• New CIES - Home Page New CIES - Home (newcies.gov.hk) • SFC's List of Eligible Collective Investment Schemes under the New Capital Investment Entrant Scheme (New CIES) List of Eligible Collective Investment Schemes under the New Capital Investment Entrant Scheme (New CIES) | SFC (sfc.hk)

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Please convey the above message to your fellow agents. Thanks for your attention. If you have any queries, please call our hotline at (852) 3108 1638 (Hong Kong).

Best regards,

Vanessa Tan
Head of Products

Best regards,

Leo Cheung
Head of Life & Wealth Management Proposition

Best regards,

Angela Lau
Head of Proposition Planning & Activation

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