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Memo

Attn: 2024 A Force Members

From: Jim Jan Zen

Copy: Mr. Alger Fung/
Mr. Louie Ho/
All Department Heads/ ABDD Executives

Dept: Management Team

Date: 2 May 2024

Total page: 13

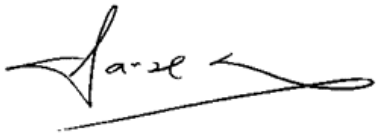
Subject: (A240504) [更新] 2024年「小龍會 MIS」競賽要求及項目 – [A動力成員]
[Update] "Meeting in Shanghai" (MIS) Overseas Convention Contest Requirements & Awards 2024 [A Force Member]

隨著友邦集團加大力度發展大中華市場，「小龍會」作為公司新力軍的第一個海外會議，目的地亦將由過往的泰國曼谷移師至中國上海舉行。上海是友邦的發源地，是一個好機會讓新人們透過首個海外會議，認識友邦的歷史及其使命，同時裝備自己，為將來發展奠定穩固根基。 適逢去年公司於上海北外灘的友邦大劇院及友邦金融中心正式開幕，得獎的 A 動力成員將有機會到訪這個區內最大的專業大劇院，見證公司的發展里程碑。

每個 A 動力成員都只有一次以新人身份參加「小龍會 MIS」，請把握機會以成為一位全方位的財務策劃顧問奮發前進，為客戶提供最適切的保障；為自己寫下成功的第一章！
MIS 競賽期為 A 動力成員合約生效起計 9 個月。達到相關競賽要求將可分別獲邀出席 2025 或 2026 年舉行之 MIS 會議。以下為競賽項目一覽:

競賽對象	合約生效月份	競賽項目
A 動力成員	2024 年 1 月至 12 月	**基本業績要求:** (1) 100% 及 200%會員資格
		其他競賽項目: (2) 小龍精英大獎 (3) 小龍會主席 (4) 小龍之星獎 (5)「AIA Vitality 健康程式」獎項 (6) 投連險業務獎項 (7) 危疾及醫療業務(IHS)獎項

約定您，在您的首個海外會議見！



Jim Jan Zen
Chief Agency Officer
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2024 年「小龍會 MIS」競賽要求及項目

海外會議目的地： 中國上海 (4 日 3 夜)

競賽對象: 2024 年 1 月至 12 月合約生效之 A 動力成員
(不包括於競賽期內晉升之營業單位主管、重新加入 AIA 的財務策劃顧問、持有財務策劃實習生合約者或財策精英起動計劃成員)

競賽期:

- 2024 年 A 動力成員合約生效日期、競賽期代號及競賽期詳情如下:

競賽期代號	合約生效月份	競賽期 (9 個月)	出席之 MIS 屆別
MIS28-06	2024 年 1 月	2024 年 1 月至 9 月	MIS 28 (暫定於 2025 年第 3 季舉行)
MIS28-07	2024 年 2 月	2024 年 2 月至 10 月	
MIS28-08	2024 年 3 月	2024 年 3 月至 11 月	
MIS28-09	2024 年 4 月	2024 年 4 月至 12 月	
MIS28-10	2024 年 5 月	2024 年 5 月至 2025 年 1 月	
MIS28-11	2024 年 6 月	2024 年 6 月至 2025 年 2 月	
MIS28-12	2024 年 7 月	2024 年 7 月至 2025 年 3 月	
MIS29-01	2024 年 8 月	2024 年 8 月至 2025 年 4 月	MIS 29 (暫定於 2026 年第 3 季舉行)
MIS29-02	2024 年 9 月	2024 年 9 月至 2025 年 5 月	
MIS29-03	2024 年 10 月	2024 年 10 月至 2025 年 6 月	
MIS29-04	2024 年 11 月	2024 年 11 月至 2025 年 7 月	
MIS29-05	2024 年 12 月	2024 年 12 月至 2025 年 8 月	

- 注意：合約生效日期為 2023 年 8 月至 12 月 (原競賽期代號：MIB28-01 至 MIB28-05) 之 A 動力成員，將與上述競賽期代號：MIS28-06 至 MIS28-12 之 A 動力成員一同出發前往上海參與該屆海外會議，而其
- **競賽要求將維持不變**，詳情請參閱原通告 A230556。

2023 年 8 月至 12 月 A 動力成員合約生效日期、競賽期代號及競賽期詳情如下:

原競賽期代號	新競賽期代號	合約生效月份	競賽期 (9 個月)	出席之 MIS 屆別
MIB28-01	MIS28-01	2023 年 8 月	2023 年 8 月至 2024 年 4 月	MIS 28 (暫定於 2025 年第 3 季舉行)
MIB28-02	MIS28-02	2023 年 9 月	2023 年 9 月至 2024 年 5 月	
MIB28-03	MIS28-03	2023 年 10 月	2023 年 10 月至 2024 年 6 月	
MIB28-04	MIS28-04	2023 年 11 月	2023 年 11 月至 2024 年 7 月	
MIB28-05	MIS28-05	2023 年 12 月	2023 年 12 月至 2024 年 8 月	

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(A) 基本業績要求

小龍會 100% 及 200%會員資格：

- 完成基本業績要求成為 100%或 200%會員將獲邀出席「小龍會 MIS」海外會議。

會員級別	總 FYC C&A (港幣)@#	保單數目 或 客戶數目		意外及醫療保險及核心關鍵產品 FYC 最低要求 (港幣)	全保理財分析報告
100%^	230,000	30	20	23,000	18
200%	460,000	15	10	46,000	9

備註：

- @強積金個人賬戶(MPFPA) 保單 FYC 可獲 5 倍計算於總 FYC C&A 內，並以個人業績 100%會員級別計算的 20%為上限（即經特別計算後最高為港幣 46,000 元）。*(新增)*
- ^100% 會員級別資格亦須於競賽期內達成「全方位業務」，即成功完成銷售最少各 1 張以下之保單：*(新增)*
  - 儲蓄保單；及
  - 保障保單；及
  - 投資相連壽險計劃 或 藍十字一般保險保單 或 CS-退休金個人業務保單。
- # 不論任何會員級別，總 FYC C&A 可包含藍十字佣金，以個人業績 100%會員級別計算的 10%為上限。（即最高港幣 23,000 元藍十字佣金）*(新增)*
- 一般保險業務包括所有經藍十字繕發的一般保險保單，涵蓋旅遊保險、個人保險及商業保險。
  一般保險業務包括於競賽期內遞交（包括首尾兩天）並必須經藍十字（亞太）保險有限公司（「藍十字」）核實及須於競賽期完結日當日或之前入賬。

基本業績競賽獎賞:

會員級別	獎賞
100%	• 來回目的地團體經濟客位機票 1 張， 及 • 雙人房佔半房(4 日 3 夜)
200%	• 可邀請嘉賓 1 位，及 • 來回目的地團體經濟客位機票 2 張，及 • 雙人房連同嘉賓各佔半房 (4 日 3 夜)

備註：

會員及同行合資格嘉賓需繳付香港/澳門及會議目的地有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會員的公司出糧戶口內扣除。如遇特殊情況，公司或會以其他獎賞作替代。

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(B) 特別競賽項目

競賽條件：

- 於相應 9 個月的競賽期內 (競賽期代號分別為 MIS28-01 至 MIS28-12； MIS29-01 至 MIS29-12)，完成 100%或 200%會員資格，可於出席之 MIS 屆別與同屆合資格成員角逐以下其他競賽項目：

競賽項目	競賽對象/資格	業績要求
(1) 小龍精英大獎 • 友邦精英學院 AIAPA 類別 • 財務策劃顧問類別	完成 MIS 100%或以上會員級別要求	每期首名以最高 FYCB 排名之 A 動力成員將成為「小龍精英」(友邦精英學院 AIAPA 類別 及 財務策劃顧問類別各 12 位)
(2) 小龍會主席	「小龍精英大獎」得獎者	最高 FYCB 排名及確定出席所屬屆別 MIS 之「小龍精英」將成為「小龍會主席」
(3) 小龍之星獎	獲得「新星獎」之 A 動力成員*	• 36 張保單**或 20 個客戶；及 • 4 個保險牌照；及 • 18 份全保理財分析報告
(4) 「AIA Vitality 健康程式」獎項	完成 MIS 100%或以上會員級別要求並必須於競賽期內為「AIA Vitality 健康程式」會員	• 於競賽期內成功與客戶生效 10 個新「AIA Vitality 健康程式」會籍；及 • 個人「AIA Vitality 健康程式」 會籍年度達金級*或按比例之金級會員 (*金級會員須於會籍年度達到 20,000「AIA Vitality 健康程式」積分，詳情請參閱 aia.com.hk/aiavitality)
(5) 投連險業務獎項	完成 MIS 100%或以上會員級別要求	於競賽期內達到投資連繫壽險產品最高年度化新保費排名及獲得「小龍精英大獎」之 A 動力成員
(6) 危疾及醫療業務(IHS)獎項	完成 MIS 100%或以上會員級別要求	每期以最高危疾及醫療產品 (IHS) FYC 排名(共 12 名)，並須達到相關產品的首年佣金(FYC)最低要求 100,000 港元

新增

*有關「新星獎」的業績要求，請參閱會籍及獎賞手冊。

**當中需包括 1 張投資壽險保單；及 1 張 CS-團體保險保單，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。

- 有關危疾及醫療產品請參閱附件。

特別競賽獎賞：

競賽項目	獎賞
(1) 小龍精英大獎 • 友邦精英學院 AIAPA 類別 • 財務策劃顧問類別	• 於會議日參與進場儀式及嘉許；及 • 安排入住單人房；及 • 會員及其 1 位嘉賓(如適用) 獲邀與公司管理層於大會目的地出席慶祝午宴 • 若會員直屬主管獲得出席資格，直屬主管亦可獲邀出席慶祝午宴

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(2) 小龍會主席	• 主持小龍會議之開幕儀式；及 • 來回目的地機場至酒店專車接送服務；及 • 來回海外會議目的地商務客位機票 1 位
(3) 小龍之星獎	• 於會議中獲得嘉許；及 • 安排入住單人房；及 • 額外一份酒店早餐
(4) 「AIA Vitality 健康程式」獎項	• 港幣 500 元現金獎賞
(5) 投連險業務獎項	• 於會議中獲得嘉許；及 • 現金獎賞港幣 1,500 元
新增 (6) 危疾及醫療業務(IHS)獎項	• 於會議中獲得嘉許；及 • 現金獎賞港幣 1,000 元

一般規則:

1. A 動力成員及「小龍會 MIS」競賽資格如下：
   - 2024 年海外會議「小龍會 MIS」A 動力成員競賽項目只限在 2024 年 1 月至 12 月合約生效的 A 動力成員參與。不包括於競賽期內晉升之營業單位主管、重新加入 AIA 的財務策劃顧問、持有財務策劃實習生合約者或財策精英起動計劃成員。
   - A 動力成員必須完成公司指定新同事入職課程並獲取 8D 牌照。
   - 更新 如屬 Industry LOU Package 的新晉財務策劃顧問 (包括但不限於 STAR PLUS, BANK LOU 並以公司的最新規定為準) 將不獲資格參與「小龍精英大獎」、「小龍會主席」、「小龍之星獎」、投連險業務獎項及危疾及醫療業務(IHS)獎項。
2. 於競賽期代號 MIS28-06 至 MIS28-12 之合資格出席者將獲邀出席 MIS28；而於競賽期代號 MIS29-01 至 MIS29-05 之合資格出席者將獲邀出席 MIS29。
3. 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、個人財物保險計劃、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 C&A 之內。
4. 意外及醫療保險(A&H)生意包括意外及醫療附加契約、意外及醫療獨立保單以及人身意外保險。
5. FYC 最低要求計算包括意外及醫療保險(A&H)及核心關鍵產品(KFP) FYC。有關核心關鍵產品 (KFP)名單，請參閱附件。
6. 保單數目要求計算如下:
   - 1 張人壽保險保單
   - 附有 1 張或以上意外及醫療保險 (A&H) 附加契約的 1 張新人壽保單，將以 2 張保單計算
   - 1 張獨立個人意外保險保單 (IPA)
   - 1 張人身意外保險保單 (PAC)
   - 1 張個人財物保險保單

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- 1 張 CS-團體保險業務，包括套裝計劃、度身訂造計劃、「意安心升級保障」 - 友邦特選成員版或「友心意」醫療保障計劃 2 (Laughing 自選牙科保障計劃及澳門摯開心自選牙科保障計劃除外)
- 1 張 CS-退休金企業業務保單，包括公積金(ORSO)、澳門退休金計劃及強積金僱主退休計劃
- 3 張 CS-退休金個人業務保單，包括自僱人士退休計劃、強積金個人賬戶、尊享強積金個人賬戶、強積金可扣稅自願性供款計劃、澳門私人退休金計劃及公積金個人計劃(於同一年度同一身份客戶將以一個計算)，將以 1 張保單計算

7. 客戶 = 凡為新/現有受保人完成 1 張成功批核之人壽、個人意外保險保單、「意安心升級保障」 - 友邦特選成員版或「友心意」醫療保障計劃 2，即可成就 1 位客戶。於競賽期內重覆銷售予同一受保人，亦只計算為成就 1 位客戶。
8. 現有客戶、新客戶或準客戶之全保理財分析報告可計算於競賽業績內。iFHC 報告必須透過電郵發送至客戶或準客戶才獲計算。 於競賽期內重複建立 iFHC 報告予同一客戶或準客戶，將以一份報告計算。
9. 「小龍精英大獎」、「小龍會主席」及「小龍之星大獎」將以 FYCB 計算；而會員資格及獎賞將沿用 FYC C&A 計算。
10. 若兩位財務策劃顧問共同遞交同 1 張保單或成就同 1 名客戶或同 1 個「AIA Vitality 健康程式」會籍， 將以 0.5 單位計算予各人。
11. 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。
12. 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。
13. 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。
14. 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。
15. 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。
16. A 動力新星獎之競賽規則，以公司會籍及獎賞手冊為準。
17. 競賽結果以保單冷靜期後作調整為準。
18. 會議出席資格不得轉讓。A 動力成員及營業單位主管必須於會議舉行期間仍與公司持有效合約， 方能出席會議並取得有關獎賞。
19. 公司保留隨時修改競賽規則及嘉許之權利，恕不另行通知。
20. 如遇特殊情況，公司或會以其他獎賞作替代。
21. 如有任何異議，以 AIA 最後決定為準。

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"Meeting in Shanghai" (MIS) Overseas Convention Contest Requirements & Awards 2024 [A Force Member]

Destination: Shanghai, China (4 Days 3 Nights)
Eligibility: A Force members contracted from January to December 2024
(Agency Leader promoted during contest period, re-joined financial planners, those with internship contract or joined Start-up Elite Programme are excluded)

Contest Period:

- Respective 2024 A Force members contract date, contest period code and contest period listed as below:

Contest Period Code	Contract Date	Contest Period (9 Months)	MIS Convention to be Attended
MIS28-06	January 2024	January – September 2024	MIS 28 (Tentatively to be held during 3Q 2025)
MIS28-07	February 2024	February – October 2024	
MIS28-08	March 2024	March – November 2024	
MIS28-09	April 2024	April – December 2024	
MIS28-10	May 2024	May 2024 – January 2025	
MIS28-11	June 2024	June 2024 – February 2025	
MIS28-12	July 2024	July 2024 – March 2025	
MIS29-01	August 2024	August 2024 – April 2025	MIS 29 (Tentatively to be held during 3Q 2026)
MIS29-02	September 2024	September 2024 – May 2025	
MIS29-03	October 2024	October 2024 – June 2025	
MIS29-04	November 2024	November 2024 – July 2025	
MIS29-05	December 2024	December 2024 – August 2025	

- Attention: For A Force members contracted between August to December 2023 (Original Contest Period Code: MIB28-01 to MIB28-05), qualifiers will be invited to attend MIS28 in Shanghai together with Contest Period Code MIS28-06 to MIS28-12 members, while the **contest requirements remain unchanged**, for details, please refer to Memo A230556. The respective 2023 A Force members contracted date, contest period code and contest period listed as below:

Original Contest Period Code	New Contest Period Code	Contract Date	Contest Period (9 Months)	MIS Convention to be Attended
MIB28-01	MIS28-01	August 2023	August 2023 – April 2024	MIS 28 (Tentatively to be held during 3Q 2025)
MIB28-02	MIS28-02	September 2023	September 2023 – May 2024	
MIB28-03	MIS28-03	October 2023	October 2023 – June 2024	
MIB28-04	MIS28-04	November 2023	November 2023 – July 2024	
MIB28-05	MIS28-05	December 2023	December 2023 – August 2024	

(A) Basic Production Requirements

MIS 100% & 200% Membership Qualification:

- A Force members who fulfill the production requirement will be invited to join the MIS overseas convention.

Membership Level	Total FYC C&A (HK$)@#	Case Count	OR	No. of Customer	A&H & Key Focus Products FYC (HK$)	iFHC Report
100%^	230,000	30		20	23,000	18
200%	460,000	15		10	46,000	9

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Remarks:
- @MPF Personal Account (MPFPA) FYC will be 5 times special counted in total FYC C&A and capped at 20% of 100% Personal Production level. (i.e. up to HK$46,000 after special counted) *(New)*
- ^100% membership requires to achieve "full range of business" within the contest period, i.e. has at least 1 of each following policies: *(New)*
    - Savings Plan; AND
    - Protetction Plan; AND
    - Unit-linked Business Plan OR Blue Cross General Insurance Business OR CS-Pension Retail Case.
- #Regardless of qualifier category, the total FYC C&A can include the amount of Blue Cross commission up to 10% of 100% Personal Production level (i.e. up to HK$23,000). *(New)*
- General Insurance Business defines as all general insurance policies issued by Blue Cross, including travel insurance, personal insurance, and commercial insurance.
- General Insurance Business includes all cases submitted within Contest Period (including the first & last day), which are verified by Blue Cross (Asia Pacific) Insurance Limited and booked on or before end of respective contest period.

Prizes & Recognition:

Membership Level	Prizes & Recognition
100%	• Round-trip Group Air Ticket to the destination (Economy Class) x 1, and • Twin Sharing Hotel Accommodation (4 Days 3 Nights)
200%	• 1 Guest Observer, and • Round-trip Group Air Ticket to the destination (Economy Class) x 2, and • Twin Sharing Hotel Accommodation with Guest Observer (4 Days 3 Nights)

Remarks:
The expenses of Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination will be borne by qualifiers and their respective guest observer (if any). The mentioned cost and all extra expenses will be debited from qualifiers' company payroll account after the trip. Please note that AIA reserves the right to offer alternative prize arrangement.

(B) Special Awards

Production Requirements:
- Within the respective 9-month Contest Period (MIS28-01 to MIS28-12; MIS29-01 to MIS29-12), A Force members who fulfil 100% or 200% membership qualification will be eligible to compete for the below awards for respective MIS Convention.

Awards	Eligibility	Production Requirements
(1) Top of the Class Award • AIA Premier Academy (AIAPA) level • FP level	MIS 100% or above membership qualifiers	The highest total FYCB ranked in each contest period code (i.e. 12 "Top of the Class" qualifiers for AIAPA & FP level respectively)
(2) MIS President	"Top of the Class Award" Qualifiers	The highest total FYCB ranked among the "Top of the Class" qualifiers and finally attended the MIS convention will be named as the "MIS President"
(3) MIS Star Award	A Force "First Challenge Award" Qualifiers*	• 36 Cases** or 20 Customers, and • 4 Insurance Licenses, and • 18 iFHC Reports

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	(4) AIA Vitality Award	MIS 100% or above membership qualifiers with inforce AIA Vitality member within contest period	• Achieve minimum 10 New AIA Vitality Memberships within contest period, and • Achieve pro-rata AIA Vitality Gold status* within respective membership year (*Gold status refers to members who achieved at least 20,000 AIA Vitality points within the membership year; details can be referred to aia.com.hk/aiavitality)
	(5) Top ULB Award	MIS 100% or above membership qualifiers	The highest total ANP of ULB products ranked at the end of the contest period and achieved Top of the Class Award
New	(6) Top Integrated Health Strategy (IHS) Award	MIS 100% or above membership qualifiers	The highest total FYC of IHS products ranked in each contest period code (in total 12 seats), with a minimum FYC of HKD 100,000 of related products

* For "First Challenge Award" requirements, please refer to C&A Manual.
** Included 1 Investment Linked Case; and 1 CS-EB Case OR 1 CS-Pension Corporate Case OR 3 CS-Pension Retail Cases.
- Please refer to Appendix for Integrated Health Strategy products.

Prizes & Recognition:

	Awards	Prizes & Recognition
	(1) Top of the Class Award • AIA Premier Academy (AIAPA) level • FP level	• Being recognized and invited to join the march-in ceremony on Convention Day; and • Single room accommodation during the trip; and • Qualifiers and their guest observer (if applicable) will be invited to join the MIS Celebration Luncheon with top management at the destination • If respective Direct Leaders are eligible to attend the convention, they will also be invited to join the Celebration Luncheon
	(2) MIS President	• To officiate the opening of the MIS Convention Meeting; and • 2-way limousine transfer from airport to hotel at the destination • 1 seat of round-trip Business Class to the Convention destination
	(3) MIS Star Award	• Being recognized on Convention Day; and • Single room accommodation during the trip; and • 1 extra hotel breakfast during the trip
	(4) AIA Vitality Award	• HK$500 cash prize
	(5) Top ULB Award	• Being recognized on Convention Day; and • Cash reward of HK$1,500
New	(6) Top Integrated Health Strategy (IHS) Award	• Being recognized on Convention Day; and • Cash reward of HK$1,000

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General Rules:

1. A Force members & MIS convention contest eligibility refer to:
   - Only A Force members contracted from January to December 2024 are eligible to participate in the 2024 MIS overseas convention contest - A Force category. Agency leaders promoted during contest period, Re-joined financial planners, those with internship contract or joined Start-up Elite Programme are excluded.
   - All A Force members must have attended Core training course with attendance rate of 80% or above.
   - New financial planners with Industry LOU Package (including, but not limit to, STAR PLUS, BANK LOU and subject to the latest definition by the Company) are not qualified for the Top of the Class Award, MIS President, MIS Star Award, Top ULB Award and Top Integrated Health Strategy (IHS) Award.

Update

2. Eligible qualifiers within contest period MIS28-06 to MIS28-12 will be invited to attend the MIS28 convention; eligible qualifiers within contest period MIS29-01 to MIS29-05 will be invited to attend the MIS29 convention.
3. FYC C&A on all Life, Life A&H Riders, Standalone Life A&H, PA, Personal Lines, CS-EB, CS-Pension Corporate and CS-Pension Retail will be counted.
4. A&H business includes A&H Riders, Standalone and PA business.
5. Min. FYC production requirement including A&H and Key Focus Products (KFP) FYC. For KFP list, please refer to appendix.
6. Case count calculation including the followings:
   - 1 Life case
   - 1 new Life case with 1 or more A&H Riders will be counted as 2 cases
   - 1 IPA case
   - 1 PAC case
   - 1 Personal Lines case
   - 1 CS-EB case, including package, tailor-made plan, Secure First Plus – AIA Selected Member version and StepUp Medical Plan 2 (excluding Laughing Voluntary Dental Care Plan & Cheers Macau Dental Plan);
   - 1 CS–Pension Corporate Cases, including ORSO, Macau Corporate Pension Schemes and MPF Employer Pension Scheme
   - 3 CS–Pension Retail Cases include Self-Employed Person (SEP) Schemes, MPF Personal Account (MPFPA), Preferential MPF Personal Account, MPF Tax Deductible Voluntary Contribution Scheme (TVC), Macau PPF Personal Account and Macau Individual Provident Fund Scheme (based on unique ID in the same sales year) will be counted as 1 case
7. Customer = 1 approved Life, PA Policy, Secure First Plus – AIA Selected Member Version or StepUp Medical Protection Plan 2 during the contest period from new/existing insured is equivalent to 1 Lives saved. Repeated sales to the same insured during the qualifying period are considered as 1 Lives saved.
8. The iFHC report of existing customers, new customers and prospect will be counted to the production requirement. Only iFHC reports sent to customer or prospect customer via email will be counted. iFHC reports generated underthe same customer within the contest period will be counted as one report.
9. FYCB is used for counting for Top of the Class Award, MIS President and MIS Star Award, while FYC C&A is used for counting qualification & benefit.
10. Joint case count or customer count or AIA Vitality membership count will be counted as 0.5 for each financial planner.
11. Cases changed / lapsed from existing policies of the same insured will not be counted.
12. Joint policies will be shared evenly among the co-producers.
13. 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.
14. 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.
15. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.

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16. Detailed qualifying rules of "1st Challenge Award" will follow Clubs & Awards Manual.
17. Cooling-off policies are excluded.
18. All privileges and awards of related Convention are not transferable and are restricted to Financial Planners or Agency leaders who hold valid contracts with the Company at the time of Convention.
19. AIA reserves the right to amend any of the rules and recognition arrangement of this contest (program) at any time without prior notice.
20. AIA reserves the right to offer alternative prize arrangement.
21. In the event of any dispute, AIA's decision is final.

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附件 Appendix - 特選核心關鍵產品及附加契約 Key Focus Products (KFP) 及 危疾及醫療產品 Integrated Health Strategy (IHS)

Products (Core) 產品 (核心)	KFP	IHS
All AIA Voluntary Health Insurance Schemes series (including Privilege Ultra, Flexi & Standard Scheme) – Hong Kong only 所有AIA自願醫保計劃 (VHIS)系列 (包括尊耀、靈活、標準計劃) – 只限香港	✔	✔
Privilege Ultra Medical Plan series 「尊耀」醫療計劃系列	✔	✔
Privilege Ultra Pearl Medical Plan series 「尊耀明珠」醫療計劃系列	✔	✔
CEO5 series 「至尊醫療 5」系列	✔	✔
Super Good Health 2 series 特級「健康之寶」2 系列	✔	✔
Cancer Guardan 3 series 「癌症全方位保障 3」系列	✔	✔
Simple Care Essence series 簡護危疾保系列	✔	✔
Wisdom Term Life Plan Series 摯誠定期壽險計劃系列	✔	
Expert Term Life Plan Series 尊誠定期壽險計劃系列	✔	
Level-Up Protect Cancer Plan (LUP) 「進添」計劃 - 癌症保障	✔	✔
Hospital and Surgical Rider (HS) 80 – Macau only 「永無憂」住院及手術賠償附加契約(80 系列) - 只限澳門	✔	✔
Individual Medical Plan (IMP) 80 – Macau only 「倍無憂」醫療保障計劃(80 系列) - 只限澳門	✔	✔
Silvery Protect 「銀意保」	✔	
Xtra Protect 「添意保」	✔	
Severe Illness Medical Protection Rider Series 「嚴重疾病醫療保障附加契約」系列	✔	✔
"AIA One Absolute – Cancer & Serious Infectious Disease Protection" series AIA唯一摯保 - 癌症及嚴重傳染病保障系列	✔	✔
"AIA One Absolute – Full Protection" series AIA 唯一摯保 - 全面保障系列	✔	✔
Health Journey Guardian 全程守護健康保	✔	✔
GBA Health Connect Outpatient Plan (GBAOP) 「大灣醫薈通」門診計劃	✔	✔

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Products (Others) 產品 (其他)	KFP	IHS
Metro Trio Medical & Critical illness Protection Plan Series 「都市三保」醫療危疾保障計劃系列	✔	✔
StepUp Medical Protection Plan 「友心意」醫療保障計劃	✔	✔
Hospital Benefit Rider (HB) 「樂無憂」住院惠益附加契約	✔	✔
EasyGuard Term Life Place 「守康易定期壽險計劃」	✔	
EasyGuard Care Essence 「守康易危疾保」	✔	✔
Flexi-MediGuard 「靈活住院惠益保障計劃」	✔	✔
Grand VIP 「豐逸行」	✔	
Super Adults Shield (SAS) 「盛年意家保」	✔	
Super Seniors Shielf (SSS) 「豐年意家保」	✔	
Simplified Accidental Death & Dismemeberment Rider 簡易意外死亡及斷肢附加契約	✔	
Critical Illness Rider Pro (CI Rider Pro) 危疾附加契約	✔	✔
Enhanced Critical Illness Rider Pro (ECIR Pro) 特選危疾附加契約	✔	✔
Cancer Care Essence 智護癌症保	✔	✔
Super HealthGuard Pro 進泰附加契約	✔	
One Your Side Plan / On Your Side Plan – First Gift 「愛伴航」/「愛伴航-首護摯寶」	✔	✔
AIA Assemble 「自在自選」危疾保	✔	✔
Shield Up Cancer Protection Plan 「友愛護」癌症保障計劃	✔	✔

備註 Remarks：

- 包括「AIA 健康系列」之基本計劃及明珠版之基本計劃(如適用) Basic plans of "AIA Vitality Series" & Pearl Series are included (if applicable)
- 更新截至 2024 年 5 月 27 日 Updated as of 27 May 2024.

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