友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

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

Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)	From:	Amy Chan
Copy:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / Ms. Amelie Shen / All Department Heads / ABDD Executives / CSBD Executives / Contact Centre	Dept:	Corporate Solutions
Date:	2 May 2024	Total pages:	2 + Appendix

Subject: **(A240510) 「友心意」醫療保障計劃 2 — 特別投保安排（延長至 8 月 31 日）**
StepUp Medical Protection Plan 2 - Special Enrolment Arrangement (Extended to 31 August)

好消息！「友心意」醫療保障計劃 2（「友心意 2」）特別投保安排自去年 12 月推出以來，反應熱烈，深受團體醫療保險計劃成員所歡迎，現決定**將推廣期延長至 2024 年 8 月 31 日，且優惠內容不變**，以讓更多合資格成員可以在推廣期內隨時投保，毋須限時限刻，**兼享首年 9 折保費優惠**！投保過程一氣呵成，讓您可以儘快簽單。機會難逢，勿失良機 ！

請各營業同事細閱以下特別投保安排之詳情，把握 IVS 銷售良機！

推廣期：	2023 年 12 月 1 日**至 2024 年 8 月 31 日**
合資格客戶：	AIA 團體醫療保險計劃成員 （AIA 團體醫療保險計劃並不包括自選或附加保障之計劃，以及擁有 AIA 團體醫療保險計劃的公司須於投保及 / 或最新保單週年日時擁有 8 名或以上全職僱員）
優惠內容：	合資格成員在推廣期內可**隨時投保「友心意 2」，毋須醫療核保，並享有首年 9 折保費優惠***！ 此外，合資格成員^更可**在成功投保「友心意 2」後**根據每張生效的「友心意 2」新保單**獲取 2 張 500 港元◆電子保費現金券(總值 1,000 港元 / 澳門幣)**（請參閱通告 A240190），**並可同時尊享 IVS「友得揀 」客戶優惠**。（請參閱通告 A240469） * 優惠受有關條款及細則約束，詳情請參閱產品簡介。財務策劃顧問必須持有有效的相關牌照，方可銷售推廣活動中的產品。 ^ 成員必須於電子保費現金券發放當日仍為合資格受保僱員 ◆ 相等於 500 澳門幣 / 420 人民幣 / 63 美元 / 63 澳元 / 63 加元 / 38 英鎊 / 44 歐元 / 75 新加坡元 電子保費現金券有效期為 4 個月，電子保費現金券的使用受條款及細則約束。（請參閱通告 A240190）
推廣範本：	**最新的「友心意 2」推廣電郵範本已上載至營業員專頁**，以供營業同事隨時下載並分享給僱主 / 人力資源部，讓其轉發給僱員，**掌握最新客戶優惠**。 路徑：eAC > 部門資訊 > 團體業務部 > 僱員福利友邦業務代表專區 > 營業員活動概覽 > 營銷推廣 > Worksite Marketing > Worksite Marketing 推廣工具 1) **「友心意 2」推廣電郵範本—人力資源部版本【2024-05】**（附件 1） 2) **「友心意 2」推廣電郵範本—僱員版本【2024-05】**（附件 2） 此外，**「友心意 2」宣傳海報範本**（附件 3）將於 5 月 10 日上載至 eAC 供下載及分享。

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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Good News! Since its launch in December last year, the **Special Enrolment Arrangement of StepUp Medical Protection Plan 2 ("StepUp 2")** has received an overwhelming response and is well received by members of group medical insurance schemes. We have now decided to **extend the promotion period to 31 August 2024, with the offer remains unchanged**, allowing more eligible members to enrol at any time during the promotion period and **enjoy a 10% premium discount for the first year**. Without the requirement of submitting application during the designated period, you can complete the enrolment in one go and get the policy signed the soonest. The opportunity is rare, don't miss it!

Please read the below details of the special enrolment arrangement carefully and seize the IVS sales opportunity!

Promotion Period：	1 December 2023 – **31 August 2024**
Eligible Customers:	Members under an AIA group medical insurance scheme (AIA group medical insurance scheme does not include voluntary or top-up policies and the company with the AIA group medical insurance scheme is required to have a minimum of 8 full-time employees at policy application and/or on the latest policy anniversary date)
Offer details:	Eligible members can **enrol in StepUp 2 at any time** during the promotion period **without the requirement of medical underwriting and enjoy a 10% premium discount* for the first year**! In addition, eligible members^ can also **receive two HK$500◆ e-Premium Coupons (with a total value of HK$/MOP1,000)** for each newly in-force StepUp 2 policy that they own **after successfully enrolling in StepUp 2** (Please refer to Memo A240190) and can **enjoy the IVS Exclusive Customer Offer at the same time**. (Please refer to Memo A240469). * The offer is subject to relevant terms and conditions, please refer to the product brochure for details. Financial Planners must hold respective valid license to sell the products in the promotional campaign. ^ Customers must still be eligible insured employees on the e-Premium Coupon issue date ◆ Equivalent to MOP 500 / RMB 420 / US$ 63 / AUD 63 / CAD 63 / GBP 38 / EUR 44 / SGD 75 The e-Premium Coupons will be valid for 4 months upon issuance, with terms and conditions applied when using the e-Premium Coupons. (Please refer to Memo A240190)
Promotion Templates:	**The latest StepUp 2 Promotion Email Templates have been uploaded to eAC** for you to download at any time and share them with employers or Human Resources Departments so that they can forward it to employees **to keep abreast of the latest customer offers**. Path: eAC > Departments > Corporate Solutions > Employee Benefits Representative's Corner > Agency Activities > Marketing > Worksite Marketing > Worksite Marketing Tool 1) **"StepUp 2" Promotion Email Template - HR Version [2024-05]** (Appendix 1) 2) **"StepUp 2" Promotion Email Template - Employee Version [2024-05]** (Appendix 2) In addition, the **"StepUp 2" Promotion Poster Template** (Appendix 3) will be uploaded to eAC for uploading and sharing on 10 May.

If you have any questions, please contact your designated CSBD Agency executives/IVS Team.

We wish you every success!

Yours faithfully,

Amy Chan
Head of IVS
CS - Individual Voluntary Solutions

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附件 1：「友心意 2」推廣電郵範本—人力資源部版本【2024-05】

[StepUp 2 Template - Note to Agents: This letter is for HR communication only]



致[Name of recipient]：

全面保障能讓員工無後顧之憂地投入工作。「友心意」醫療保障計劃 2 有助您的員工加強醫療保障，即使他們離職或準備退休，也能享有終身的醫療保障，而您亦毋須承擔額外支出或行政工作。

作為我們尊貴的客戶，我們致力為您提供獨家禮遇及最強支援。您的員工可享以下尊屬優惠：



* 推廣期 (2023 年 12 月 1 日至 2024 年 8 月 31 日) 內，符合相關產品「成員投保指引」中所述投保資格的 AIA 團體醫療保險計劃成員可隨時(不受相關「成員投保指引」中所載遞交申請時段所限)投保「友心意 2」，可享相關產品簡介中所述首年 9 折保費優惠。家屬投保只適用於如公司之 AIA 團體醫療保險計劃提供家屬保障（不包括自選家屬保障）。相關保費折扣適用於主要保障及附加門診保障（如有）的保費。為免生疑問，如您在投保時並沒有同時申請主要保障及附加門診保障，在保單生效後申請的附加門診保障不會享有以上保費折扣。如有任何爭議，AIA 保留最終決定權。有關更多上述優惠及投保詳情，請參閱「友心意」醫療保障計劃 2 產品簡介內的「成員投保指引」。

我亦很樂意到訪貴公司，為您/ 您的團隊/ 您的員工進行簡介會（或任何最適合您的安排），分享是次限時優惠的詳情。如有任何查詢，請透過 WhatsApp 或致電[Agent's Mobile number]與本人聯絡。

[WhatsApp QR code]

此致

[Name of the financial planner]

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Appendix 1: "StepUp 2" Promotion Email Template - HR Version [2024-05]

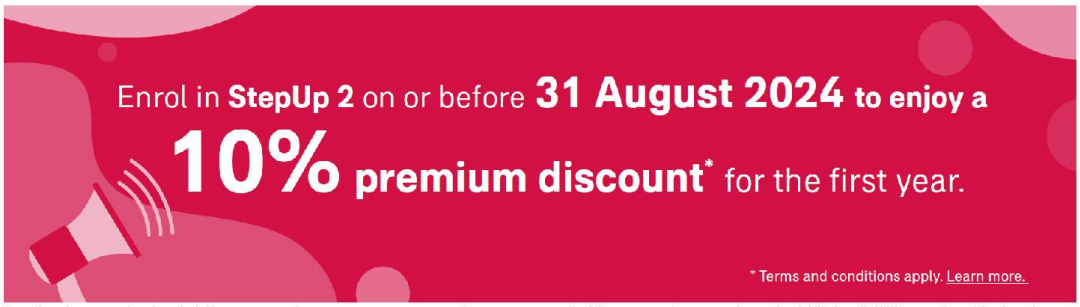
[StepUp 2 Template - Note to Agents: This letter is for HR communication only]



Dear [Name of recipient],

Comprehensive protection allows employees to focus on their work in a worry-free way. StepUp Medical Protection Plan 2 ("StepUp 2") enhances your employees' medical protection for a lifetime, even if they leave the company or enter retirement, without any extra cost to you and with no administrative burden.

As our valued client, you can always count on receiving our exclusive offers and the best support possible. We are pleased to present the following special offer.



* During the promotional period (from 1 December 2023 to 31 August 2024), AIA group medical insurance scheme members who fulfil the eligibility mentioned in the relevant "Member Enrolment Guidelines" can enrol in StepUp 2 at any time (not subject to the application submission periods as stated in the relevant Guidelines) and enjoy the 10% premium discount for the first year as stated in the relevant product brochure. Enrolment for dependants is only available if the company offers an AIA group medical insurance scheme to employees' dependants (not including voluntary dependant cover). Relevant premium discount is applicable to the premiums of core benefits and optional outpatient benefit (if any). For the avoidance of doubt, if the optional outpatient benefit is not applied together with the core benefits at policy application, the optional outpatient benefit that applied after the policy is effective will not be entitled to the above premium discount. In case of any disputes, the decision of AIA shall be final and conclusive. For more information about above-mentioned offer and enrolment, please read the "Member Enrolment Guidelines" in the relevant product brochure.

I would be happy to arrange a briefing session with you / your team / your employees directly, whichever suits you the best, to share details of the limited-time offer. For any inquiries, please contact me via WhatsApp or at [Agent's Mobile number].

[WhatsApp QR code]

Your sincerely,

[Name of the financial planner]

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附件 2：「友心意 2」推廣電郵範本—僱員版本【2024-05】

[StepUp 2 Template - Note to Agents: This letter is for HR communication only]



各位同事：

我們很重視您的全方位健康。隨著現代醫療技術不斷進步，治療費用亦繼而飆升，令人難以應付。提升您的醫療保障，讓您安心無憂，勇對未來。

友邦「友心意」醫療保障計劃 2 為您提供全面的醫療保障方案，助您彌補保障缺口，讓您可以安享生活，終身無憂。為協助您及您的家人加強醫療保障，我們很高興為您帶來 AIA 的尊屬優惠。



註：上述優惠只適用於現有友邦團體保險成員。推廣期 (2023 年 12 月 1 日至 2024 年 8 月 31 日) 內，符合相關產品「成員投保指引」中所述投保資格的 AIA 團體醫療保險計劃成員可隨時(不受相關「成員投保指引」中所載遞交申請時段所限)投保「友心意 2」，可享相關產品簡介中所述首年 9 折保費優惠。家屬投保只適用於如公司之 AIA 團體醫療保險計劃提供家屬保障（不包括自選家屬保障）。相關保費折扣適用於主要保障及附加門診保障（如有）的保費。為免生疑問，如您在投保時並沒有同時申請主要保障及附加門診保障，在保單生效後申請的附加門診保障不會享有以上保費折扣。如有任何爭議，AIA 保留最終決定權。有關更多上述優惠及投保詳情，請參閱「友心意」醫療保障計劃 2 產品簡介內的「成員投保指引」。

歡迎同事踴躍參與相關簡介會
日期：X 月 X 日至 X 日
時間：
地點：

如有查詢，各位同事可掃描以下二維碼或致電[Agent's Mobile number] 與友邦香港財務策劃顧問[Name of the financial planner]聯絡。

[WhatsApp QR code]

人力資源部

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Appendix 2: "StepUp 2" Promotion Email Template - Employee Version [2024-05]

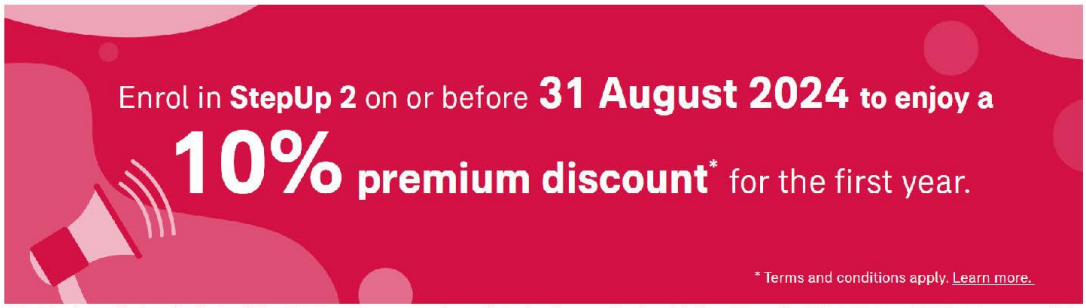
[StepUp 2 Template - Note to Agents: This letter is for HR communication only]



Dear colleagues,

Your health and wellbeing are our top priority. With consistent advancements in medical technologies, medical expenses are constantly on the rise. Boosting your medical protection can help you take on the future with peace of mind.

AIA's StepUp Medical Protection Plan 2 ("StepUp 2") provides you with a comprehensive solution for medical protection beyond your employment insurance coverage, with essential features that fill the protection gap for a lifetime of security. To help you and your loved ones enhance your medical protection, we are pleased to present the following exclusive offer from AIA.



Note: The above offer is applicable to existing AIA Group Insurance members only. During the promotional period (from 1 December 2023 to 31 August 2024), AIA group medical insurance scheme members who fulfil the eligibility mentioned in the relevant "Member Enrolment Guidelines" can enrol in StepUp 2 at any time (not subject to the application submission periods as stated in the relevant Guidelines) and enjoy the 10% premium discount for the first year as stated in the relevant product brochure. Enrolment for dependants is only available if the company offers an AIA group medical insurance scheme to employees' dependants (not including voluntary dependant cover). Relevant premium discount is applicable to the premiums of core benefits and optional outpatient benefit (if any). For the avoidance of doubt, if the optional outpatient benefit is not applied together with the core benefits at policy application, the optional outpatient benefit that applied after the policy is effective will not be entitled to the above premium discount. In case of any disputes, the decision of AIA shall be final and conclusive. For more information about above-mentioned offer and enrolment, please read the "Member Enrolment Guidelines" in the relevant product brochure.

You are encouraged to join the briefing.

Date: XXXX to XXXXXX
Time:
Place:

For any inquiries, you may contact [Name of the financial planner] via WhatsApp or at [Agent's Mobile number].

[WhatsApp QR code]

Human Resources Department

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附件 3：「友心意 2」宣傳海報範本
Appendix 3: "StepUp 2" Promotion Poster Template



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