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Memo

Attn.:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong Region)	**From:**	Vanessa Tan
		Dept.:	Product Innovation, Development & Delivery Department
Copy:	Mr. Alger Fung / Mr. Jim Jan Zen / Ms. Alice Liang / Ms. Melissa Wong / Mr. Louie Ho / Mr. Chris Lau / All Department Heads / Heads of Agency Division / BPs / Call Centre	**Total pages:**	2 pages + enclosure
Date:	20 May, 2024		

Subject: **A240540** **新 CIES 保單之服務流程簡化**
New CIES Policy Service Procedures Simplification

我們自 2024 年 4 月 18 日開始接受符合「新資本投資者入境計劃」(新 CIES) 的保單申請以來，一直致力於簡化投保程序。我們很高興地通知您，其中一份表格「金融中介協議 - 新資本投資者入境計劃」已經在 iPoS 上提供。

即日起，財務策劃顧問**不能再**使用書面表格來填寫「**金融中介協議 - 新資本投資者入境計劃**」。這項改進將有助於更快地提交符合新 CIES 資格的保單申請。

有關已更新的符合新 CIES 的保單申請之服務流程的內容，請參閱附件。

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請將以上訊息傳達予屬下的營業同事，多謝合作！如有任何查詢，請經 iEngage/PES 使用進行查詢。

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Since we began accepting applications for policies eligible for the New Capital Investment Entrant Scheme (New CIES) on 18 April 2024 , we have been working to simplify the policy application procedures. We are pleased to inform you that one of the written forms, "**Financial Intermediary Agreement – New Capital Investment Entrant Scheme**," is now available on iPOS.

Effective immediately, financial planners can **no longer** use the paper form for the "Financial Intermediary Agreement – New Capital Investment Entrant Scheme". This enhancement will allow for faster submission of applications for policies eligible for the New CIES.

Please refer to the enclosure for the updated service procedures to submit application for policies eligible for the New CIES.

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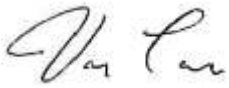
Please convery the above message to your fellow agents. Thank you for your attention. Should you have any queries, please enquire by using Chatbot in iEngage/ PES.

Best regards,



Vanessa Tan
Product Innovation, Development & Delivery Department

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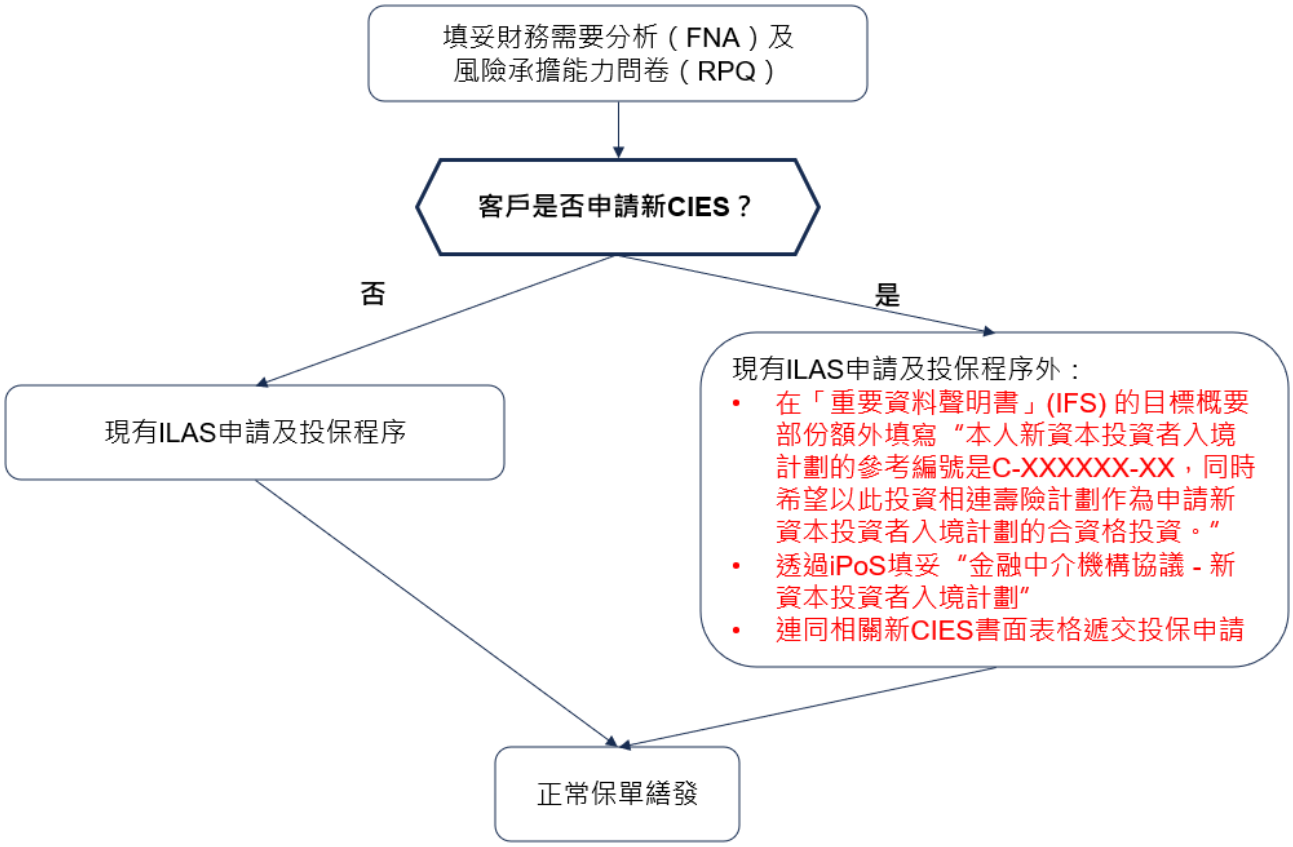
附件: 遞交符合新 CIES 的保單申請之服務流程

概覽



1. 客戶需要在「重要資料聲明書」(IFS) 的目標概要部份，填寫

- 本人新資本投資者入境計劃的參考編號是 C-XXXXXX-XX，同時希望以此投資相連壽險計劃作為申請新資本投資者入境計劃的合資格投資
- 投連險的目標概要要求 – 公司現時可接受此其中之一句例子：「投資及經協議之人壽保障」



2. 客戶需要在「投保申請書類型 」部份的新資本投資者入境計劃選項打勾，並填寫新資本投資者入境計劃參考編號：C-XXXXXX-XX



3. 客戶需要在「新資本投資者入境計劃」部份填寫「金融中介機構協議 - 新資本投資者入境計劃」電子表格並簽名確認



4. 營業員須連同以下表格*及相關文件（按該等表格要求）遞交投保申請。

1) 客戶委任金融中介機構之聲明（書面表格）
2) 金融中介協議 - 新資本投資者入境計劃 (**必須在iPoS上填寫及遞交電子表格，無需填寫書面表格**)
3) 新資本投資者入境計劃授權書（書面表格）
4) 新資本投資者入境計劃資料披露同意書（書面表格）
5) 新資本投資者入境計劃核對文件清單（書面表格）

* 營業員可於 eAC > 營運部 > 核保 > 表格，參閱新 CIES 書面表格

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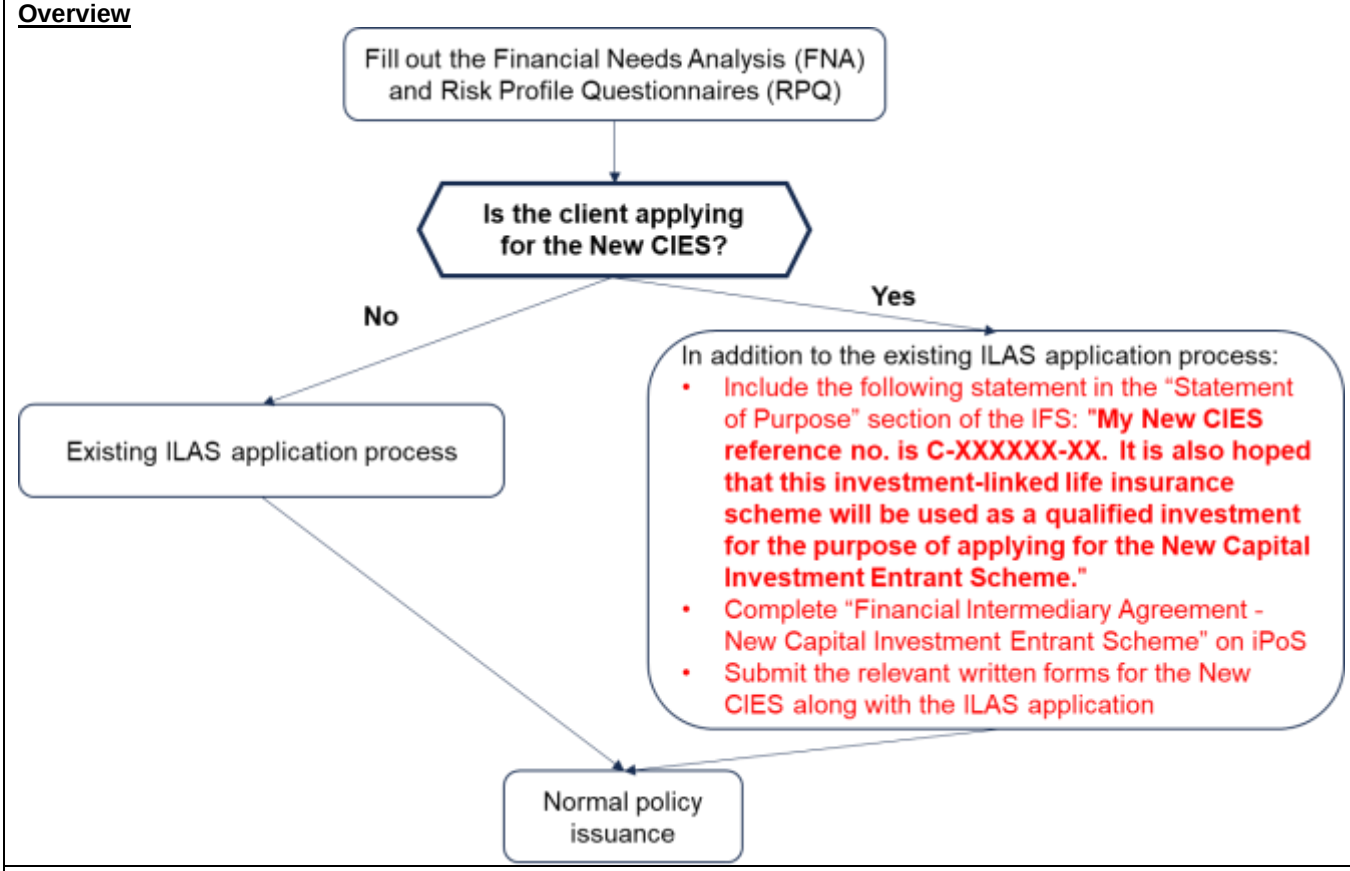
Enclosure: Service procedures to submit application for policies eligible for the New CIES

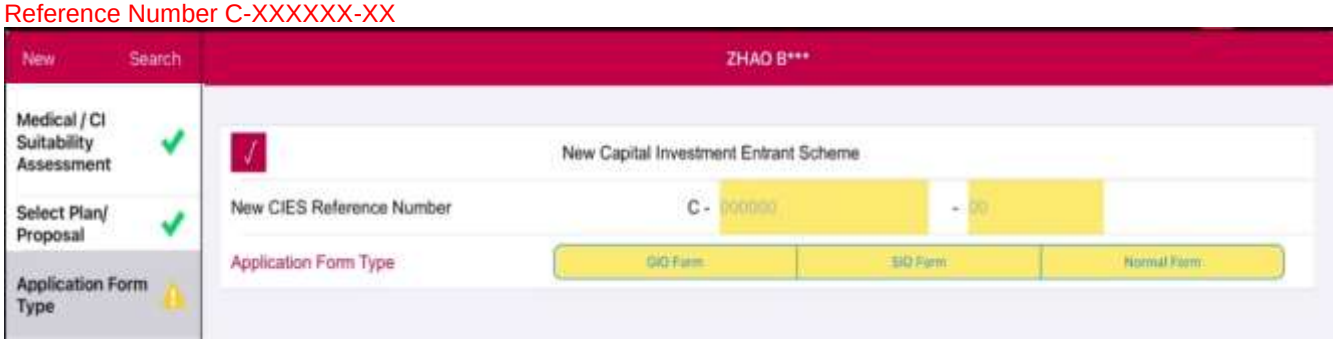
Overview



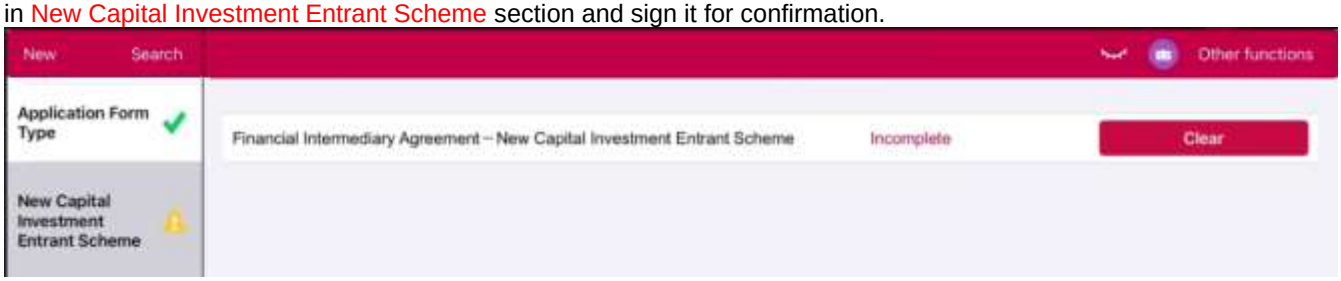
1. Customer needs to fill in the Statement of Purpose in Importance Facts Statement (IFS) section, including
   - My New CIES reference no. is C-XXXXXX-XX. It is also hoped that this investment-linked life insurance scheme will be used as a qualified investment for the purpose of applying for the New Capital Investment Entrant Scheme
   - Statement of Purpose for ILAS – One of these sentence examples is currently acceptable： "Investment with agreed life protection"



2. Customer needs to tick the New CIES checkbox in Application Form Type section and fill in the New CIES Reference Number C-XXXXXX-XX



3. Customer needs to fill in the e-Form of Financial Intermediary Agreement– New Capital Investment Entrant Scheme in New Capital Investment Entrant Scheme section and sign it for confirmation.



4. Agents need to submit the following forms* and the related documents (as specified in the forms) along with the ILAS application.

1) Customer Declaration for Appointment of Financial Intermediary (paper form)
2) Financial Intermediary Agreement– New Capital Investment Entrant Scheme (**must be filled in and submitted on iPoS, no need to fill in the paper form**)
3) New Capital Investment Entrant Scheme Authorization Letter (paper form)
4) Consent Letter for Release of Information for New Capital Investment Entrant Scheme (paper form)
5) New Capital Investment Entrant Scheme Checklist (paper form)

* Agents can refer to the New CIES written forms on eAC > Operation Department > Underwriting > Forms