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Memo

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	**From:**	Kenneth Luk
		Dept:	Customer and Marketing
Copy:	Mr. Alger Fung Ms. Melissa Wong All Department Heads Macau CEO / ABDD Executives	**Total pages:**	10
Date:	12 June 2024		

Subject A240603 特選付清保費/期滿保單 - 2024 年【見面「友」禮】自動化「型」銷
Selected Paid Up/ Maturity Policies – 2024 Event-triggered【Meetup Offer】



把握保單付清保費(Paid Up)/ 期滿(Maturity) 關鍵時刻
與特選客戶見面，客戶可獲港幣$100 電子購物禮券

特選客戶	• 適用於特選 2024 年度付清保費(Paid Up)或期滿(Maturity)的 AIA 個人保險保單之保單持有人 • 包括而不限於港澳客戶、入境優才及抵港抵澳內地人士(MCV)。
【見面「友」禮】自動化	• 由即日起，特選客戶於以下活動期內與財務策劃顧問見面，並透過 iChange 成功更新/確認其電郵地址或電話號碼，客戶可享見面禮遇。

保單付清保費 (Paid Up)或期滿 (Maturity) 月份	合資保單持有人可享的【見面「友」禮】活動期 (月月/日日/年年年年)			
	開始日期*		截止日期*	備註
2024 年 1 月至 5 月	06 / 12 / 2024	至	07 / 31 / 2024#	#最後延長至 2024 年 7 月底
2024 年 6 月			07 / 31 / 2024#	#最後延長至 Paid Up 或 Maturity 月份之後 1 個月的月底
2024 年 7 月			08 / 31 / 2024#	
2024 年 8 月			09 / 30 / 2024#	
2024 年 9 月	07 / 01 / 2024		10 / 31 / 2024	活動期自動設為 Paid Up 或 Maturity 月份之前 2 個月的月初至後 1 個月的月底 (「前 2 後 1」)
2024 年 10 月	08 / 01 / 2024		11 / 30 / 2024	
2024 年 11 月	09 / 01 / 2024		12 / 31 / 2024	
2024 年 12 月	12 / 01 / 2024		01 / 31 / 2025	

*以 iChange 遞交的確認紀錄 (香港時間及 AIA 之伺服器接收的時間) 為準。

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	#因反應熱烈，2024 年 1 月至 8 月內 Paid Up 或 Maturity 的保單已於 2024 年 3 月起符合第二季【見面「友」禮】(通告 A240409)，現按上述列表最後延長活動截止日期，請把握最後機會與特選客人保持聯繫！
見面禮遇	• 合資格客戶將可獲贈價值港幣/澳門幣 **$100** 電子購物禮券 (為百佳或奇華購物禮券，如禮券不足，將以其他商戶之同等價值禮券代替)。 • 電子購物禮券將於有效的iChange記錄後的6星期內透過iGift直接發送電郵予合資格客戶。 • 受條款及細則約束活，詳情請參閱附錄 1。
溫馨提示: **Recapture VIP 優惠**	• 此活動的特選客戶均合資格就指定儲蓄產品 (一次性繳付保費計劃) 享Recapture尊貴(VIP)投保優惠高達6%折扣。 • 顧問可於PES瞭解其客戶電子保費現金券的最新餘額。 • 受條款及細則約束。有關 Recapture 推廣活動之詳情請按鏈結參閱通告 A240102及宣傳單張。
客戶名單及活動期	財務策劃顧問可透過以下平台查閱合資格客戶名單： • **包括港澳客戶及抵港抵澳內地人士 MCV** eAC / iPOS / AIA Smart / CRM >> 見面「友」禮 - 特選客戶名單 (詳情請見附錄 2) • **只包括港澳客戶** CRM >> [Recapture] 2024 年重點客戶名單
活動推廣	• eDM 推廣電郵於付清保費或期滿月份發送予合資格保單的 Opt-in 港澳客戶。
備註	• 此活動只適用於特選客戶。財務策劃顧問於分享有關資訊予客戶前，必須確定客戶是否為適用的特選客戶。 • 此見面禮遇並不涉及任何新保單銷售或購買。 • **請注意：** ○ 所有銷售活動及投保申請必須在香港及澳門境內進行。 ○ 營業員必須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及"抵港內地人士認證手續之工作流程"。 • 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。若特選客戶為 Opt-out 客戶，財務策劃顧問不應以此禮遇作為邀約或更新客戶資料的原因。

活動期有限，請與客人保持聯繫，深化客戶關係！

如有任何疑問，可於 iEngage/PES 內的 Chatbot 查詢，或電郵至客戶及市場策劃 (Customer and Marketing) AIAHK.CustomerExperience-ECM@aia.com

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Seize the advantage from the moment of policy paid up / maturity! Meet and greet with HK$100 merchant e-voucher!

Selected Customers	• Selected policyholders whose AIA individual life policy(ies) to be paid up or mature in 2024. • Include but no limited to HK & Macau customers, talents from admission schemes, and the mainland Chinese visitors (MCV).
Event Triggered 【Meetup Offer】 Campaign	• From now on, the selected customers who meet with their financial planners to update or confirm their email addresses or phone numbers iChange, during the campaign period listed below, can enjoy the Meetup Offer.

Policy paid up / maturity month	【Meetup Offer】Campaign Period (MM/DD/YYYY) of the eligible policyowners			
	Start Date*		End Date*	Remarks
Jan-May 2024	06 / 12 / 2024	to	07 / 31 / 2024#	# Final extension to end July 2024.
Jun 2024			07 / 31 / 2024#	# Final extension to the month end of 1-month after paid up / maturity month.
Jul 2024			08 / 31 / 2024#	
Aug 2024			09 / 30 / 2024#	
Sep 2024	07 / 01 / 2024		10 / 31 / 2024	Campaign period is automatically triggered, from the beginning of the 2-month before the paid up or maturity month, until the month end of the 1-month after.
Oct 2024	08 / 01 / 2024		11 / 30 / 2024	
Nov 2024	09 / 01 / 2024		12 / 31 / 2024	
Dec 2024	12 / 01 / 2024		01 / 31 / 2025	

* Subject to iChange submission record (based on Hong Kong time and the time received by AIA's server).

Since the Q2 Meetup Offer Campaign (memo A240409) for the policies paid up or matured in January to August 2024 have been well received by the financial planners and customers, the campaign deadline is now being specially extended as per the abovementioned list. Please seize this final opportunity to stay in touch with selected customers!

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Meetup Offer	• The qualified customers will be eligible to HKD/MOP $100 merchant e-voucher (designated as Parknshop or Kee Wah e-vouchers. If the designated e-vouchers are out of stock, other merchant e-vouchers at an equivalent value will be replaced.) • The e-voucher will be sent to the qualified customers' emails via iGfit in 6 weeks after receiving valid iChange record. • Terms & conditions apply (Appendix 1).
Reminder: Recapture VIP Offer	• The selected customers of this campaign are also eligible to the exclusive Recapture VIP premium discount on the designated savings products (one-time premium payment) up to 6% off. • Financial planners can view customers' latest balance of e-premium coupons via PES. • Terms & conditions apply. For details, please click Recapture Promotion memo A240102 and the leaflet.
List of the Selected Customers	Financial planners can check out the eligible customer lists via below platforms: • **Including HK, Macau and MCV customers** eAC / iPOS / AIA Smart / CRM >> Meetup Offer - Selected Customer List (See Appendix 2 for details) • **Including HK & Macau customers only** CRM >> [Recapture] 2024 Selected Customers
Promotion	• eDM will be sent to HK & Macau eligible opt-in customers during the policy paid up/maturity month
Remarks	• This campaign is only applicable to the selected customers. Please check customer's eligibility before sharing the campaign information. • The offer does not involve any new policy sales or purchases. • **Note:** o All solicitation activities and insurance application must be conducted in Hong Kong or Macau territory. o Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants/Policyowner From MCV Business" and "Guidelines for Sales and Marketing to MCV Business prospects". o Before contacting the policyholder, please check whether the policyholder is on the opt-out list or not. If the customers have opted out, financial planners should refrain using this offer as a reason to invite them for a meetup or update their contact information.

Limited-time customer activity! Please stay connected with your customers!
Should you have any queries, please enquire by using Chatbot in iEngage/PES, or email to Customer and Marketing at AIAHK.CustomerExperience-ECM@aia.com

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Best regards,



Kenneth Luk
Head of Customer and Growth Marketing

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附錄 1：2024 年【見面「友」禮】自動化「型」銷活動 – 條款及細則

1. 此活動只適用於 2024 年度付清保費(Paid Up)或期滿(Maturity)的 AIA 個人保險保單(「合資格保單」)之保單持有人(「特選客戶」)。
2. 此活動期由 2024 年 6 月 12 日至 2025 年 1 月 31 日止 (包括首尾兩天) 期間，見以下「活動期時間表」)：

保單付清保費(Paid Up) 或期滿 (Maturity) 月份	合資保單持有人可享的【見面「友」禮】活動期 (月月/日日/年年年年)		
	開始日期*		截止日期*
2024 年 1 月至 5 月	06 / 12 / 2024	至	07 / 31 / 2024
2024 年 6 月			07 / 31 / 2024
2024 年 7 月			08 / 31 / 2024
2024 年 8 月			09 / 30 / 2024
2024 年 9 月	07 / 01 / 2024		10 / 31 / 2024
2024 年 10 月	08 / 01 / 2024		11 / 30 / 2024
2024 年 11 月	09 / 01 / 2024		12 / 31 / 2024
2024 年 12 月	12 / 01 / 2024		01 / 31 / 2025

*以 iChange 遞交的確認紀錄 (香港時間及 AIA 之伺服器接收的時間) 為準。

3. 於活動期內，特選客戶與財務策劃顧問見面，並透過 iChange 成功更新或確認其電郵地址或電話號碼後，該特選客戶（「合資格客戶」）將可獲贈價值港幣/澳門幣 $100 電子購物禮券(「禮遇」) (百佳或奇華價值港幣/澳門幣 $100 的購物禮券將隨機送出，不設選擇。如禮券不足 ，我們將以其他商戶之同等價值禮券代替)。
4. 每名合資格客戶可憑每張合資格保單獲取見面禮遇最多 1 次。
5. 此禮遇並不涉及任何新保單銷售或購買。
6. 電子購物禮券將於 AIA 之伺服器接收的 iChange 記錄後的 6 星期內透過 iGift 直接發送電郵予合資格客戶。客戶須透過 iChange 向 AIA 提供有效的電郵地址或電話號碼作領獎安排。
7. AIA 並不負責核實合資格客戶所提供的電郵地址真確性。若合資格參加者所遞交的資料有錯漏/不正確而影響接收電郵(領獎通知)，AIA 概不補發。
8. 電子購物禮券須受禮券上之銷售條款約束。禮券之使用受限於供應商規定的條款和細則。
9. 電子購物禮券不可轉售、轉讓、退款及退換，以兌換現金或換取任何其他產品。
10. 電子購物禮券逾期無效。於使用後即告作廢，如遺失將不會獲補發。
11. AIA 並非電子購物禮券的製造 / 供應商並不就禮品承擔任何義務和責任。由電子購物禮券引起的任何爭議均由參加者和製造商 / 供應商直接解決。電子購物禮券之使用受限於條款和細則，有關電子購物禮券使用詳情，請參閱其條款及細則。
12. AIA 對本條款及細則擁有絕對解釋權。如有任何爭議，AIA 將擁有最終決定權。

其他注意事項：

1. 財務策劃顧問不應以此禮遇作為客戶投保之誘因，及影響客戶作出知情的投保決定。財務策劃顧問向客戶推介產品前須進行財務需要分析，以評估客戶的需要及承擔能力。客戶須根據自己的需要及承擔能力以決定保費。

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2. 香港及澳門財務策劃顧問只能於所屬營業牌照境內進行受規管活動。所有銷售活動及投保申請必須在香港及澳門境內進行。財務策劃顧問須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及"抵港內地人士認證手續之工作流程"。
3. 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。如是，請勿在獲取客戶明確同意前進行直接促銷(包括促銷推廣活動的優惠)。

Appendix 1: Terms & Conditions of 2024 Event-triggered【Meetup Offer】Campaign

1. This campaign is only applicable to the policyholders ("Selected Customers") whose AIA individual life policy(ies) to be paid up or matured in year 2024 ("Eligible Policy").
2. The period of this campaign is from 12 June 2024 to 31 January 2025 (both dates inclusive) with reference to the Campaign Period Mapping Table below:

Policy paid up / maturity month	【Meetup Offer】Campaign Period (MM/DD/YYYY) of the eligible policyowners		
	Start Date*		End Date*
Jan-May 2024	06 / 12 / 2024	to	07 / 31 / 2024
Jun 2024			07 / 31 / 2024
Jul 2024			08 / 31 / 2024
Aug 2024			09 / 30 / 2024
Sep 2024	07 / 01 / 2024		10 / 31 / 2024
Oct 2024	08 / 01 / 2024		11 / 30 / 2024
Nov 2024	09 / 01 / 2024		12 / 31 / 2024
Dec 2024	10 / 01 / 2024		01 / 31 / 2025

*Subject to iChange submission record (based on Hong Kong time and the time received by AIA's server).

3. During the campaign period, if the Selected Customers meet with their financial planners, and successfully update or confirm their email address or phone number via iChange, they ("Qualified Customers") will be eligible to HKD/MOP $100 merchant e-voucher ("Offer") (Either Parknshop or Kee Wah e-vouchers valued at HKD/MOP $100 will be randomly distributed. No selection is not available. If the designated e-voucher is out of stock, other merchant e-vouchers at an equivalent value will be replaced.)
4. Each Qualified Customer can entitle to the meetup Offer per Eligible Policy once only.
5. The Offer does not involve any new policy sales or purchases.
6. The e-voucher will be sent to the Qualified Customers' emails via iGfit in 6 weeks after receiving valid iChange record. The Qualified Customers should provide valid email addresses or mobile phone numbers to AIA via iChange for the Offer redemption arrangement.
7. AIA is not responsible for verifying the email addresses or mobile numbers submitted by the Qualified Customers. Should there be any misdelivery of email notification regarding Offer redemption resulted from inaccurate / incorrect information submitted by the Qualified Customers, AIA will not re-issue the Offer.
8. The e-vouchers are subject to the terms of sale printed on the ticket. The use of e-voucher is subject to the terms and conditions stipulated by the organizer, including arrangements made in response to the latest epidemic prevention regulations.
9. The e-vouchers cannot be converted, sold, redeemed or returned for cash.

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10. The e-vouchers shall be used on or before the expiry date. The e-vouchers shall be invalid after the expiry date and will become void once used. No replacement will be issued if lost.
11. AIA is not the manufacturer/supplier of the e-vouchers and shall have no obligation and liability in any issues that arise from the Offer. Any disputes arising from the Offer shall be resolved between the participants and the manufacturer / supplier directly. The use of the e-voucher is subject to terms and conditions. For details of how to use the e-voucher, please refer to the relevant terms and conditions as set by the manufacturer/supplier.
12. AIA reserves the right to interpret these terms and conditions. For any dispute arising from this campaign, AIA reserves the right of final decision.

Other Points to Note:

1. Financial planners should not use this Offer as the incentive for attracting customers to apply for an insurance plan and should not be used to distract customers from making an informed decision on whether or not to purchase the product. Financial planners must conduct financial needs analysis to assess the customers' needs and affordability before making product recommendation. Customers should decide the premium based on their needs and affordability.
2. This campaign can only be promoted within Hong Kong and Macau territory according to the agent's relevant license. All solicitation activities and insurance application must be conducted in Hong Kong and Macau territory. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants/Policyowner From MCV Business" and "Guidelines for Sales and Marketing to MCV Business prospects".
3. Before contacting the policyholder, please check whether the policyholder is on the opt-out list or not. If yes, please do not conduct direct marketing before obtaining explicit consent from customers (including the promotional offer).

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附錄 2：【見面「友」禮】自動化「型」銷 — 特選客戶名單及活動期
Appendix 2: Event Triggered【Meetup Offer】Campaign - Selected Customer List & Campaign Period

營業員專頁 (eAC) > 競賽報告 > 推廣計劃 > 客戶名單(其他資訊) >
Agency Corner (eAC) > Contests > Campaigns > Customer List (Info) >



iPoS > 推廣活動及銷售機遇 > Recapture
iPoS > Leads & Campaigns > Recapture



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AIA Smart > 📣 > 推廣活動類別 > Recapture

AIA Smart > 📣 > Campaign Type > Recapture



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