AIA Hong Kong

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

AIA.COM.HK

Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only)

From: Redmund Chiu
Head of Underwriting

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 6 Jun 2024

Total page: 2

Subject: (Ref: A240615) 2024 年下半年度新生意之截數日 (只限香港)
Closing Dates for New Business Application from Jul to Dec 2024 (Hong Kong only)

敬請留意以下為 2024 年 7 月至 12 月之新生意及 iPoS 電子遞交截數日期及時間。詳情請參閱以下列表:

月份	傳統投保申請書 所有保險產品的截數日期	iPoS 電子申請書 所有保險產品的截數日期
2024 年 7 月	2024 年 7 月 29 日 (星期一)	2024 年 7 月 31 日 (星期三)
2024 年 8 月	2024 年 8 月 28 日 (星期三)	2024 年 8 月 31 日 (星期六)
2024 年 9 月	2024 年 9 月 26 日 (星期四)	2024 年 9 月 30 日 (星期一)
2024 年 10 月	2024 年 10 月 29 日 (星期二)	2024 年 10 月 31 日 (星期四)
2024 年 11 月	2024 年 11 月 27 日 (星期三)	2024 年 11 月 30 日 (星期六)
2024 年 12 月	2024 年 12 月 27 日 (星期五)	2024 年 12 月 31 日 (星期二)
	截數時間: 17:00	截數時間: 21:00

所有於上述列明的截數日期及時間或之前所遞交的投保申請書，而在該月底或之前成功批核，將計算在財務策劃顧問該月份之營業額內。

公司亦藉此機會提示各財務策劃顧問必須留意每月的截數日期及時間，並請儘早遞交申請書及文件以便營運部處理。

為確保以電子申請遞交之新生意能順利計算在該月份之營業額內，請參考以下的小貼士 :

1. 沒有待決事項之新生意
2. 使用光學字符識別 (OCR) 拍攝身份證以確保準受保人及申請人的個人資料之準確性
3. 於申請過程中避免使用自行填寫訊息及 '其他'功能
4. 確保拍攝之文件存放於正確之文件夾內 (例如: 身份證、護照等)
5. 紙本申請只適用於特別計劃報價、公司作爲持有人之保單、信託保單、以圖章及指紋作爲簽署的保單類別申請

如有任何查詢，請經 iEngage/PES 使用 Chatbot 進行查詢。

只供內部使用FOR INTERNAL USE ONLY
於這通告內所提及的「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）。AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

AIA Hong Kong

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

AIA.COM.HK

Memo

We are pleased to inform you that the closing dates and cut-off time for New Business submitted in paper form and iPoS submission for July to December 2024 are as below. Please refer to the table below for details:

Month	Paper application form submission Closing date for all products	iPoS application submission Closing date for all products
July 2024	July 29, 2024 (Monday)	July 31, 2024 (Wednesday)
August 2024	August 28, 2024 (Wednesday)	August 31, 2024 (Saturday)
September 2024	September 26, 2024 (Thursday)	September 30, 2024 (Monday)
October 2024	October 29, 2024 (Tuesday)	October 31, 2024 (Thursday)
November 2024	November 27, 2024 (Wednesday)	November 30, 2024 (Saturday)
December 2024	December 27, 2024 (Friday)	December 31, 2024 (Tuesday)
	Cut-off time: 17:00	Cut-off time: 21:00

All new applications submitted on or before the closing dates and cut-off time as outlined above and approved on or before the end of that month will be counted as the production case of that month.

Please note that iPoS submission closing date will fall on the last day of each month. All Financial Planners are advised to observe and submit New Business well before the closing dates to allow for possible contingency.

To ensure the applications submitted through iPoS could be processed or counted as production case of that month, please follow the tips below:

1. Clean cases
2. Use OCR (Optical Character Recognition) to capture the ID card to ensure accuracy of the Insured & applicant's personal information
3. Avoid using free text messages and the use of 'Others' functions in the application process
4. Ensure the captured documents are put in the right folders (e.g. Identity card, passport etc.)
5. Paper applications only apply for Special Quotation, Company as owner, Trust, Stamp and Fingerprint as signature cases

For follow-up documents including medical report, amendment, counter-offer letter, etc. we will process within our agreed service benchmarks.

Should you have any queries, please enquire by using Chatbot in iEngage/PES.

Regards,



Redmund Chiu

只供內部使用FOR INTERNAL USE ONLY
於這通告內所提及的「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）。AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).