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Memo

Attn: All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners

From: Jim Jan Zen

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

Dept: Management Team

Date: 1 June 2024

Total page: 7

Subject: **(A240618) 第 23 屆巨龍會: 額外旅程京都爭奪戰 及 大阪之旅加時賽**
The 23rd Dragons' Meeting: Bonus Trip to Kyoto & Osaka Trip Catch-up

巨龍會一向是一眾營業精英們奮力爭取一席位的海外會議，至目前為止，已有數百位精英奮勇達標。六月踏入巨龍會競賽期的最後一個月，相信各位營業同事都在盡最後努力衝刺。

公司為激勵同事突破自我，爭取更好成績，會於本月推出兩項特別競賽，讓率先於 5 月份達標的同事競逐額外旅程**京都爭奪戰**；而極具潛力的營業同事只須於 6 月達指定 FYC 更可獲**延長巨龍會競賽期兩個月**，讓更多營業精英有機會參與巨龍會海外會議！

請務必把握最後機會，全力衝刺，爭奪大阪之旅一席位，或額外京都旅程！

追求卓越　成為客戶首選

有關競賽詳情請參閱下文。

Please refer to the details below.

Jim Jan Zen
Chief Agency Officer
Agency Distribution
Hong Kong and Macau
JJZ/AL/CC/KT

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(1) 第 23 屆巨龍會 - 額外旅程京都爭奪戰

目的地 : 日本京都
特別競賽日期 : 2024 年 5 月 iPoS 截數後至 2024 年 6 月 iPoS 截數日
競賽對象 : **特選**財務策劃顧問及營業單位主管
(包括截至 2024 年 5 月 31 日**已完成**第 23 屆巨龍會個人、營業單位主管或區域總監基本競賽要求之營業同事)
競賽要求 : 請參閱以下詳情

競賽期內遞交指定**新人壽及個人意外保險 FYC (以個人業績計算)**，並於 2024 年 6 月 30 日或之前獲繕發，即可獲邀於**日本京都**出席大阪之旅的額外旅程。

新人壽及個人意外保險 FYC 要求 (以個人業績計算)	獎賞	住宿安排
HK$ 250,000 [IVS「友得揀」之新 FYC 可獲 1.5 倍特別計算]#	獲邀參加「第 23 屆巨龍會」 額外旅程 - **京都之旅** (2 日 1 夜)	單人房

備註:

1. #於競賽期內遞交及獲繕發之 IVS「友得揀」新 FYC 將可獲 1.5 倍計算於業績內，並以指定 FYC 要求的 30%為上限，即特別計算只適用於相關保單達成之首 HK$75,000 新 FYC。
2. IVS「友得揀」保單只計算
   (1) 企業業務成員以保單持有人或受保人身份經以下途徑購買之全新個人保單或指定保單（包括：「友心意」醫療保障計劃 2、「友愛護」癌症保障計劃及「意安心升級保障」）：
   - 強積金 / 退休金個人賬戶成員：經現有強積金 / 退休金個人帳戶之財務策劃顧問購買
   - 強積金 / 退休金企業成員：經現有負責該強積金 / 退休金企業帳戶之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買
   - 團體保險計劃成員：經現有負責該團體保險計劃之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買

   而且此企業業務成員 (i) 於 2024 年 5 月 31 日、投保及保單繕發時應為現有友邦強積金 / 退休金成員；或 (ii) 於投保及保單繕發時應為現有友邦團體保險成員。
   (2) 在職公務員及政府聘用的非公務員（包括立法會秘書處及房屋委員會之員工）及其家屬*（配偶及子女）以保單持有人或受保人身份經任何財務策劃顧問購買指定 AIA 自願醫保計劃。
   *「家屬」指有關人員的配偶及未滿 21 歲的未婚子女（包括父母已離婚 / 依法分居子女、繼子女、領養子女及非婚生子女）。如果子女是 19 或 20 歲，則必須正在接受全時間教育或全時間職業訓練，或由於身體衰弱或精神欠妥而倚賴有關人員供養。
3. 第 23 屆巨龍會競賽詳情，請參閱通告 A230824，A230825。
4. 會員需繳付香港/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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(2) 第 23 屆巨龍會 - 大阪之旅加時賽

目的地	:	日本大阪
特別競賽日期	:	2024 年 5 月 iPoS 截數後至 2024 年 6 月 iPoS 截數日
競賽對象	:	**特選**財務策劃顧問及營業單位主管 (以個人業績計算) (包括截至 2024 年 5 月 31 日**未能完成**第 23 屆巨龍會個人業績基本競賽要求之營業同事)
競賽要求	:	請參閱以下詳情

競賽期內遞交指定**新人壽及個人意外保險 FYC** 並於 2024 年 6 月 30 日或之前獲繕發，以及於第 23 屆巨龍會原競賽期 (2024 年 6 月 30 日) 完結前完成個人業績 100%會員資格之 FYC C&A 及個人壽險續保率要求，**即可獲延長「第 23 屆巨龍會」競賽期兩個月**至 2024 年 8 月，以完成個人業績 100%會員資格。

競賽要求 (一)	競賽要求 (二)	獎賞
(1) 於 2024 年 5 月 iPoS 截數後遞交並於 2024 年 6 月 30 日前獲繕發**新人壽及個人意外保險 FYC HK$50,000**；及 (2) 於 2024 年 6 月 30 日或之前完成個人業績 100%會員資格之 FYC C&A (HK$515,000) 及個人壽險續保率要求 (80%)	獲**延長第 23 屆巨龍會競賽期兩個月**至 2024 年 8 月，以完成個人業績 100%會員資格之保單數目/客戶數目、意外及醫療保險及核心關鍵產品 FYC 要求@	獲邀參加「第 23 屆巨龍會」 - 大阪之旅 (4 日 3 夜)

備註:

1. @「第 23 屆巨龍會」個人業績基本競賽要求(包括總 FYC C&A、保單數目、客戶數目、意外及醫療保險及核心關鍵產品 FYC、及個人壽險續保率等)，詳情請參閱通告 A230824。
2. 於此「加時賽」競賽中達標成為「第 23 屆巨龍會」合資格者，最高只可獲得個人業績 100%會員資格。
3. 營業單位主管區域總監獎項 (詳情請參閱(A230825) 並不包括在此「加時賽」內。
4. 會員需繳付香港/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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一般規則：

1. 有關截數日之安排，以通告 A231227 (只限香港，2024 年 1-6 月)，MO23006 (只限澳門，2024 年 1-6 月) 及 A240147，或依照 AIA 最新之 iPoS 截數日安排為準。
2. 所有新生意必須於競賽期內透過指定電子平台遞交，並於競賽規則內訂明之日期前獲繕發，其保單數目/FYC 才獲計算。
3. 如營業同事於競賽期之前已遞交保單/保單已獲繕發，但於競賽期內撤回投保申請/取消保單，並再次投保相同產品計劃，其保單將不獲計算。
4. 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。
5. 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。
6. 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。競賽期完結時，若保單數目總數為點數, 數目將下調為整數計算。
7. 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。
8. 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。
9. 競賽結果以保單冷靜期後作調整為準。AIA 保留就調整後之競賽結果及就任何違規銷售行為追討已發放獎賞之權利。
10. 會議之出席資格不得轉讓。財務策劃顧問及營業單位主管必需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。
11. AIA 保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
12. 如有任何異議，以 AIA 最後決定為準。

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(1) The 23rd Dragons' Meeting: Bonus Trip in Kyoto

Destination	:	Kyoto, Japan
Qualifying Period	:	After May 2024 iPoS Closing – June 2024 iPoS Closing Date
Eligibility	:	Selected Financial Planners and Agency Leaders (who **has already achieved** basic requirements of personal, agency or district production of The 23rd Dragons' Meeting by 31 May 2024)
Production Requirements	:	Please refer to below for the production requirements

All Agency Leaders & Financial Planners who achieved designated **New Life & PA FYC (by personal production)** within the contest period and being delivered by 30 June 2024, will be invited to the bonus trip in **Kyoto, Japan**.

New Life & PA FYC Requirement (By personal production)	Awards	Accommodation Arrangement
HK$ 250,000 [New FYC of IVS will be 1.5 times special counted]#	Invitation to The 23rd Dragons' Meeting - Bonus Trip in **Kyoto, Japan** (2-day & 1-night)	Single room

Remarks:

1. #New FYC of Individual Voluntary Solutions (IVS) being submitted and delivered within contest period will be 1.5 times special counted with cap at 30% of FYC requirement (i.e. special count is only applicable to the **first HK$75,000 new FYC** achieved).
2. Individual Voluntary Solutions (IVS) policy is qualified only if:
   (1) Corporate Solutions members purchase a new personal insurance policy or designated policy (including StepUp Medical Protection Plan 2, Shield Up Cancer Protection Plan and Secure First Plus) as policyholder or insured through the following channels:
   - MPF/pension personal account members: Purchase through the existing financial planner of the MPF/pension personal account.
   - MPF/pension corporate members: Purchase through the existing financial planner currently responsible for the MPF/Pension corporate account, or assigned financial planners of the same agency unit.
   - Group insurance plan members: Purchase through the existing financial planner currently responsible for the group insurance account, or assigned financial planners of the same agency unit.

   and such Corporate Solutions member should be (i) an existing AIA MPF/Pension member on 31 May 2024 and at the time of application and policy issuance; or (ii) an existing AIA Group Insurance member at the time of application and policy issuance.
   (2) Serving civil servants and non-civil servants employed by the Government (including staff members of Legislative Council Secretariat and Housing Authority) and their families* (spouse and children) purchase a specified AIA Voluntary Health Insurance Scheme as policyholder or insured through any financial planner.
   *"Family" means the officer's spouse and children (including children of divorced/legally separated officers, step-children, adopted children and illegitimate children) who are unmarried and under the age of 21. In the case of children aged 19 or 20, they must also be in full time education or in full time vocational training, or dependent on the officer as a result of physical or mental infirmity.
3. For The 23rd Dragons' Meeting original contest details, please refer to memo A230824 & A230825.
4. Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination are excluded. The required expenses for the qualifiers will be debited from qualifiers' Company account automatically after the trip.

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(2) The 23rd Dragons' Meeting : Osaka Trip Catch-up

Destination	:	Osaka, Japan
Qualifying Period	:	After May 2024 iPoS Closing – June 2024 iPoS Closing Date
Eligibility	:	Selected Financial Planners and Agency Leaders (By personal production) (who **has not yet achieved** basic requirements of personal production of The 23rd Dragons' Meeting by 31 May 2024)
Production Requirements	:	Please refer to below for the production requirements

All Agency Leaders & Financial Planners who achieved designated **New Life & PA FYC** within the contest period and being delivered by 30 June 2024, also achieved 100% FYC C&A and Life Persistency requirement (personal production) by end of The 23rd Dragons' Meeting qualifying period (30 June 2024), will be allowed **to extend 2 months of The 23rd Dragons' Meeting's qualifying period** to August 2024 to qualify for 100% membership by personal production.

Requirement (1)	Requirement (2)	Award
(1) Achieve **New Life & PA FYC** Requirement **HK$ 50,000** (submitted after May 2024 iPoS Closing and delivered by 30 Jun); AND **(2)** Achieved 100% FYC C&A (HK$515,000) and Life Persistency requirement (80%) by personal production by 30 June 2024	**Extend 2 months** of qualifying period of The 23rd Dragons' Meeting to Aug 2024, in order to achieve Case count/No. of customers and A&H & Key Focus Products (KFP) FYC requirement@ of 100% membership by personal production	Invitation to The 23rd Dragons' Meeting – Osaka Trip (4-day & 3-night)

Remarks:
1. @For details of The 23rd Dragons' Meeting basic requirement (incl. FYC C&A, Case count, No. of customers, A&H & Key Focus Products (KFP) FYC, Life Persistency), please refer to memo A230824.
2. The highest qualification attained via "Osaka Trip Catch-up" contest will be 100% membership by personal production only.
3. Agency Production and District Director Awards (refer to A230825 for details) are excluded from this "Osaka Catch-up" contest.
4. Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination are excluded. The required expenses for the qualifiers will be debited from qualifiers' Company account automatically after the trip.

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General Rules & Regulations:

1. For closing dates details, please refer to memo A231227 (January – June 2024, for Hong Kong only), MO23006 (Jan - Jun 2024, for Macau only) & A240147, or subject to AIA's iPoS closing updates.
2. Only New business submitted via designated digital platforms within the contest period, and finally be delivered by specified date set out in the respective contest requirement will be counted.
3. Producers who have submitted policies / policies issued before the contest period but withdraw the captioned policy applications / cancel the captioned issued policies during the contest period and then reapply for the same products for the same insured, the corresponding case/ FYC will not be counted.
4. Cases changed / lapsed from existing policies of the same insured will not be counted.
5. Joint policies will be shared evenly among the co-producers. Cases will be counted according to total no. of cases rounding down into an integer after contest completion.
6. 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.
7. 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.
8. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
9. The result of the challenge shall be adjusted according to the execution of cooling-off rights by policyowners of the policies. AIA will reserve the right to retract the award based on the result and any substantiated violations of required sales conduct.
10. All privileges and awards of "Bonus Trip in Kyoto, Japan" are not transferrable and payable, program is subject to AIA's final decision.
11. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability at any time without prior notice.
12. In the event of dispute, AIA's decision is final and conclusive.

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