AIA Hong Kong

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

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Memo

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

From: Redmund Chiu
Head of Underwriting

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 13 Aug 2024

Total page : 6

Subject: (Ref: A240837) Underwriting Update - Relaxation on Underwriting requirement of China Assist Protection Plan/ New i-Amendment forms/ New Premium details inquiry function
核保最新資訊 - 放寬伴您遨遊中國計劃投保限制/新增電子投保申請修正書/新增保費明細查詢功能

一 放寬伴您遨遊中國計劃投保限制

為配合客戶所需並同時增加產品競爭力，友邦香港已放寬「伴您遨遊中國計劃」之投保限制，詳情請參考以下最新核保安排。

受保人 = 申請人

- 申請人年齡必須為18 歲
- 只允許購買伴您遨遊中國 (受保人)

受保人 ≠ 申請人

放寬投保限制

No	受保人年齡	申請人年齡	申請人與受保人的關係	可否購買伴您遨遊中國 (受保人)?	可否購買伴您遨遊中國 (受保人及其配偶)?
1	17歲	18歲或以上	父母	✓	✗
2	17歲	18歲或以上	配偶	✓	✓
3	17歲	18歲或以上	父母/配偶以外的關係	✗	✗
4	17歲	17歲	配偶	✗	✗
5	18歲或以上	18歲或以上	配偶	✓	✓
6	18歲或以上	18歲或以上	配偶以外的關係	✗	✗

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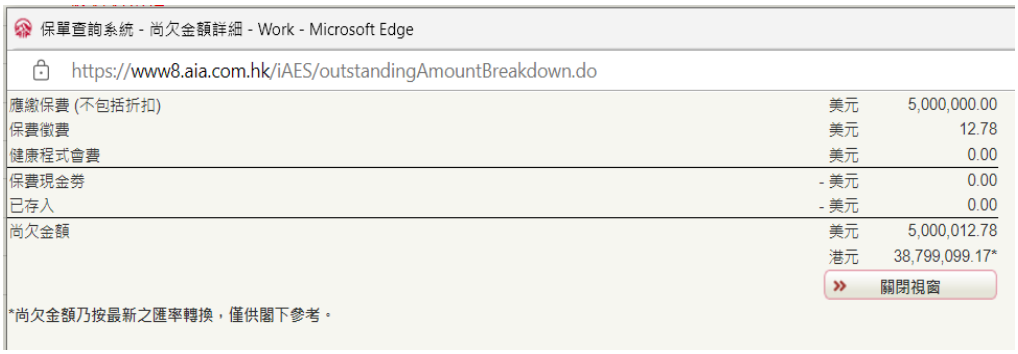
二　　新增電子投保申請修正書

為簡化處理新生意待決事項之程序，我們已新增兩份電子投保申請修正書：「投保申請修正書 - 修改地址」及「投保申請修正書 - 修改受益人」。詳情請參考附錄一。

三　　新增保費明細查詢功能

為方便財務策劃顧問了解保費詳情，我們已於保費查詢系統(PES)新增保費明細查詢功能。由2024年8月9日起，財務策劃顧問可於保費查詢系統(PES)>待批核保單>尚欠金額>詳情，查詢保費明細。詳情請參考以下內容。





如有任何查詢，請於 iEngage / PES 使用 Chatbot 進行查詢。
澳門可親臨營運服務中心查詢。

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1. Relaxation on Underwriting requirement of China Assist Protection Plan

To meet the increasing demand and uplift the competitiveness of our products, AIA Hong Kong has relaxed the underwriting requirement of China Assist Protection Plan. Please refer to the details below.

Insured = Applicant

- Applicant must be age 18.
- Only allow to purchase China Assist Protection Plan (Insured)

Insured ≠ Applicant — Relaxation

No	Insured Age	Applicant Age	Applicant & Insured Relationship	Allow to purchase China Assist Plan (Insured)?	Allow to purchase China Assist Plan (Insured & Spouse)?
1	17	18 or Above	Parent	✓	✗
2	17	18 or Above	Spouse	✓	✓
3	17	18 or Above	Relationship other than Parent/Spouse	✗	✗
4	17	17	Spouse	✗	✗
5	18 or Above	18 or Above	Spouse	✓	✓
6	18 or Above	18 or Above	Relationship other than Spouse	✗	✗

2. New i-Amendment forms

To simplify pending reply of new business, there will be two new i-Amendment forms: “AMENDMENT TO APPLICATION FOR POLICY – Amend Address” & “AMENDMENT TO APPLICATION FOR POLICY – Amend Beneficiary”. Please refer to Appendix I.

3. New Premium details inquiry function

To facilitate Financial Planners’ better understanding of premium details, we have added a new premium details inquiry function in the PES. Starting from August 9, 2024, Financial Planner can check the premium details in the PES > U&I Pending > Outstanding Amount > Details. Please refer to the following for details.

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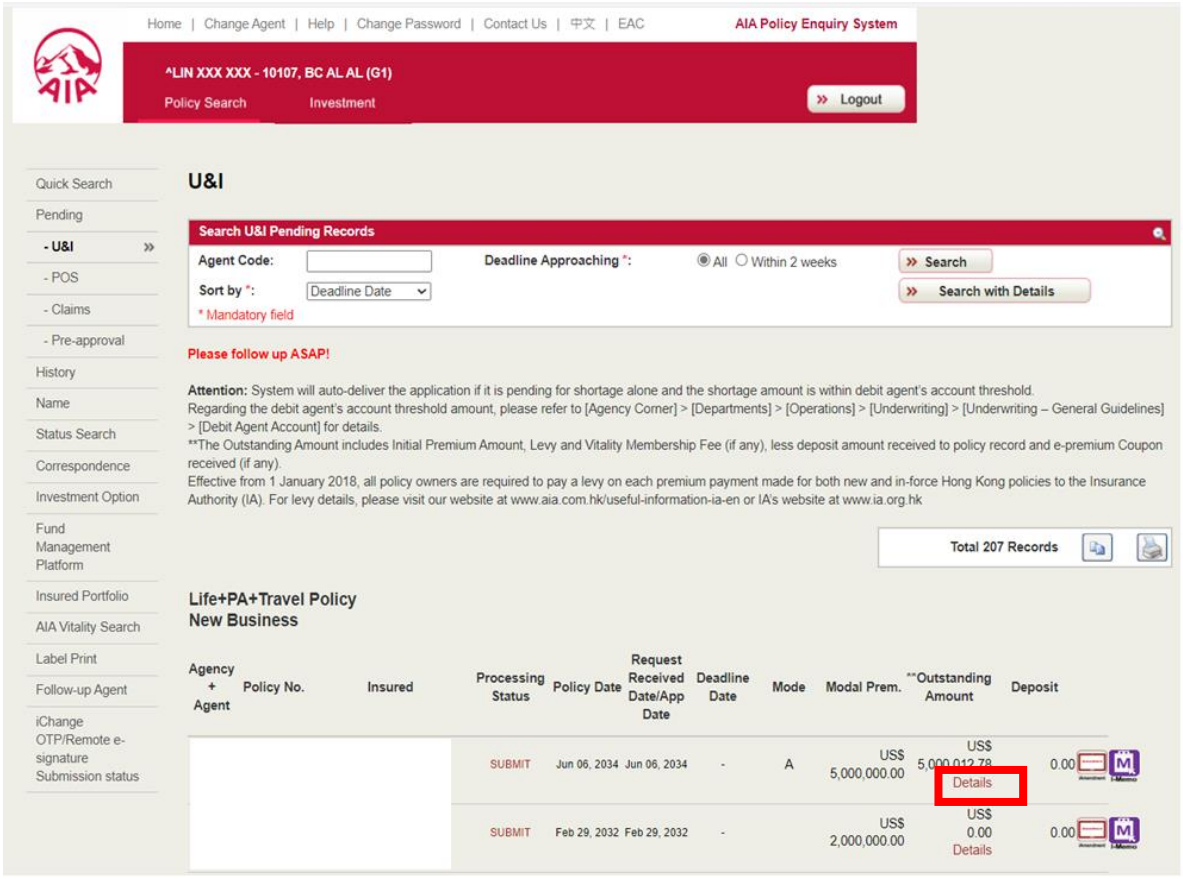

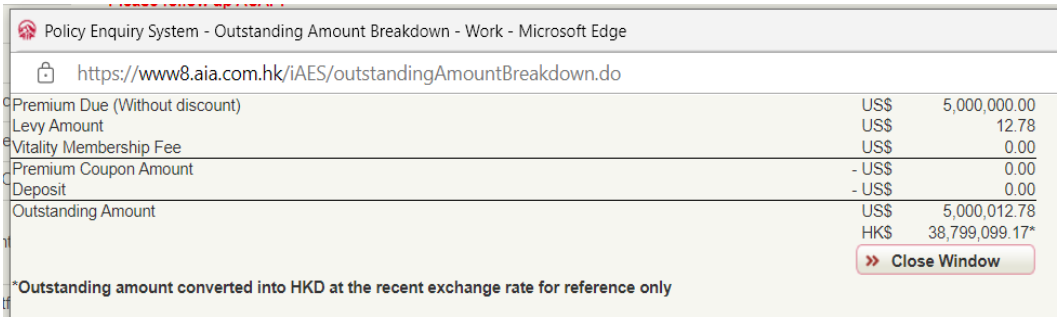

Should you have any queries, please enquire by using Chatbot in iEngage / PES.
For Macau, please visit Operations Enquiry Counter for details.

Regards,

Redmund Chiu

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附錄一
Appendix I

投保申請修正書 – 修改地址*
AMENDMENT TO APPLICATION FOR POLICY – Amend Address*



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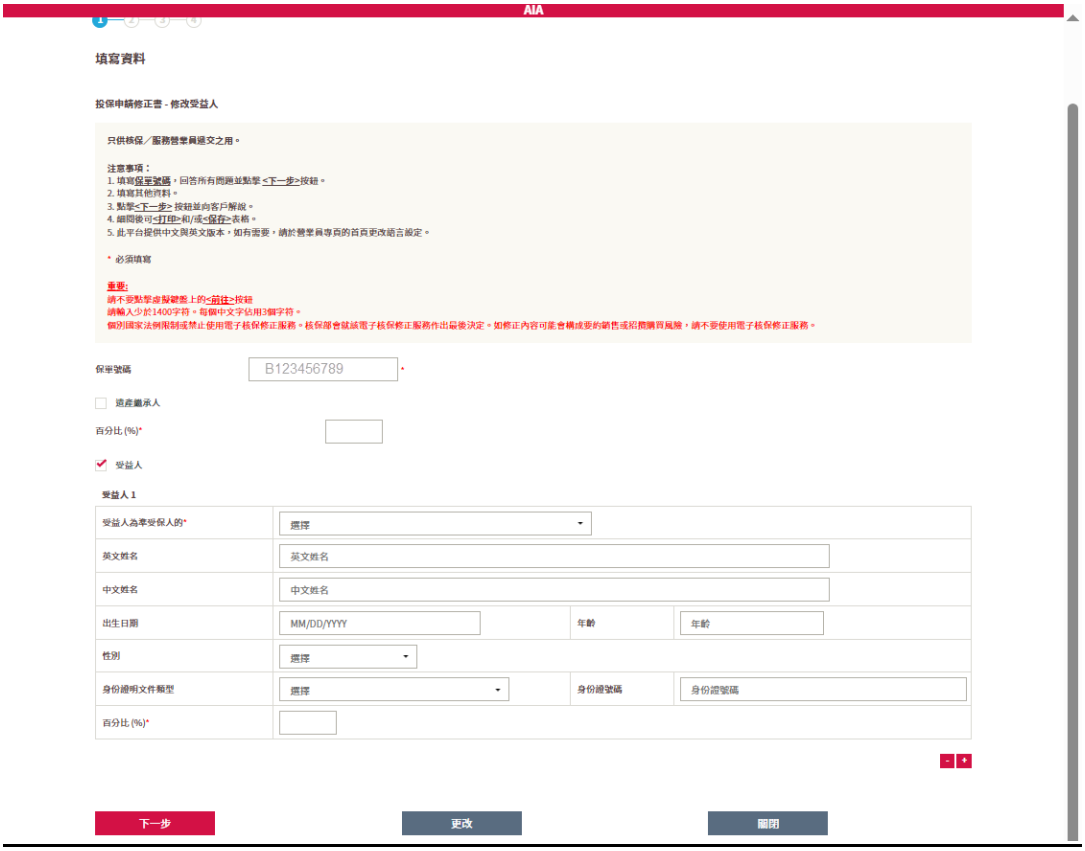
投保申請修正書 - 修改受益人*
AMENDMENT TO APPLICATION FOR POLICY – Amend Beneficiary*



投保申請修正書 - 修改受益人	OPUAIF09(IAMENDMENT)	0918		
投保申請修正書 - 修改地址	OPUAIF09(IAMENDMENT)	0918		

Remarks: No geo-location usage restriction
**備註: 無地理位置使用限制*

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