AIA Hong Kong

AIA Financial Centre,
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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)

From: Redmund Chiu
Head of Underwriting

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 08 Nov 2024

Total page : 10

Subject: (Ref: A241139) Underwriting Update – New Alternative of entry proof
核保最新資訊 - 最新入境證明替代方案

根據現時指引，目前對於遺失入境標籤的抵港內地客戶，客戶需親身前往我們的友邦財駿中心進行旅行證件驗證。為加快核保流程及持續簡化營運要求，我們现提供另一種選擇供遺失入境標籤的抵港內地客戶通過i認證申請進行驗證選擇及毋須親自前往友邦財駿中心。由即日起至2024年12月31日（申請日期），抵港內地客戶可透過其微信向「中華人民共和國出入境管理局」查詢《出入境記錄查詢結果》。詳細程序請參考附錄。

處理投保申請時請注意以下幾點：

1. 如遺失入境標籤，客戶可自行透過微信查看及下載自己的出入境記錄。
2. 由於客戶身處香港，因此需要提供“出境”中國大陸之記錄。

序号	出境/入境	出入境日期	证件名称	证件号码	出入境口岸	航班号
1	出境	2024-05-18	港澳居民来往内地通行证	[redacted]	皇岗口岸	
2	入境	2024-05-18	港澳居民来往内地通行证	[redacted]	皇岗口岸	

*若客戶是透過航空出境中國大陸, **<u>另需提供載有該航班號及目的地的登機證</u>**以證明客戶已入境香港

3. 財務策劃顧問可在 i認證的入境標籤框中拍攝客戶的出入境記錄。
4. 我們亦接受此出入境記錄以紙本文件或相中相形式提交。
5. 請注意，出入境記錄必須於提交保單申請時一併提交，逾期提交將不被接受。
6. 抵港內地客戶需要提供額外文件以證實客戶在投保申請時身處香港，例如：
   a. 申請/驗證日期附有客戶姓名的信用卡或扣帳卡消費單，或
   b. 帶有申請/驗證日期和客戶姓名的酒店收據（不是預訂單）
   - 額外證明文件可於提交保單申請時透過iPoS <入境證明>文件夾提交；或
   - 額外證明文件可後補方式提交。
7. 財務策劃顧問需要提交備忘錄，解釋為何客戶提交出入境記錄而非入境標籤。

請注意，此僅為臨時措施至2024年12月31日。

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

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According to existing procedure, for Mainland Visitor Client (MCV) who lost their landing slip, he/ she is required to visit Wealth Select Centre in person for travel document verification. To facilitate underwriting process and simplify operation requirements, we would like to provide another alternative for clients who lost landing slip to perform verification via iVerify instead of visiting Wealth Select Centre in person. With immediate effect and last until 31 December 2024 (Application Date), a MCV client is able to download his/ her own entry and exit record from National Immigration Administration via WeChat. Please refer Appendix for more details.

Please note the below points during application:

1. A MCV client can access his/her own entry and exit record via WeChat in case his/ her landing slip is lost and download a copy.
2. Since the client is in Hong Kong, the proof of "exit record" from Mainland China is required.

序号	出境/入境	出入境日期	证件名称	证件号码	出入境口岸	航班号
1	出境	2024-05-18	港澳居民来往内地通行证		皇岗口岸	
2	入境	2024-05-18	港澳居民来往内地通行证		皇岗口岸	

*If the customer is leaving Mainland China by air, a boarding pass with the flight number and destination is required to prove that the customer has entered Hong Kong

3. Financial Planner can take the picture of client's entry and exit record in the entry slip box in iVerify
4. The entry and exit record can be a printed out or photo in photo
5. Please note that the entry and exit record must be submitted at the time of application and late submission will not be accepted
6. The client needs to provide an additional proof to justify the client is physically present in HK at the time of application, e.g.
   a. credit card or debit card spending slip with client's name on the date of verification/application.
   b. hotel receipt with verification/application date and client's name (booking slip is not accepted):
   i) additional proof can be captured by iPos <Entry Proof> folder at the time of policy application; OR
   ii) additional proof can be submitted subsequently
7. Financial Planner is required to submit a memo to explain why client submits entry and exit record instead of landing slip

Please note that this is only a temporary measure and last until 31 December 2024.

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

Regards,



Redmund Chiu

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附錄
Appendix
透過微信查詢《出入境記錄查詢結果》指引
Guidance of entry and exit record enquiry via WeChat

1



2



3



4



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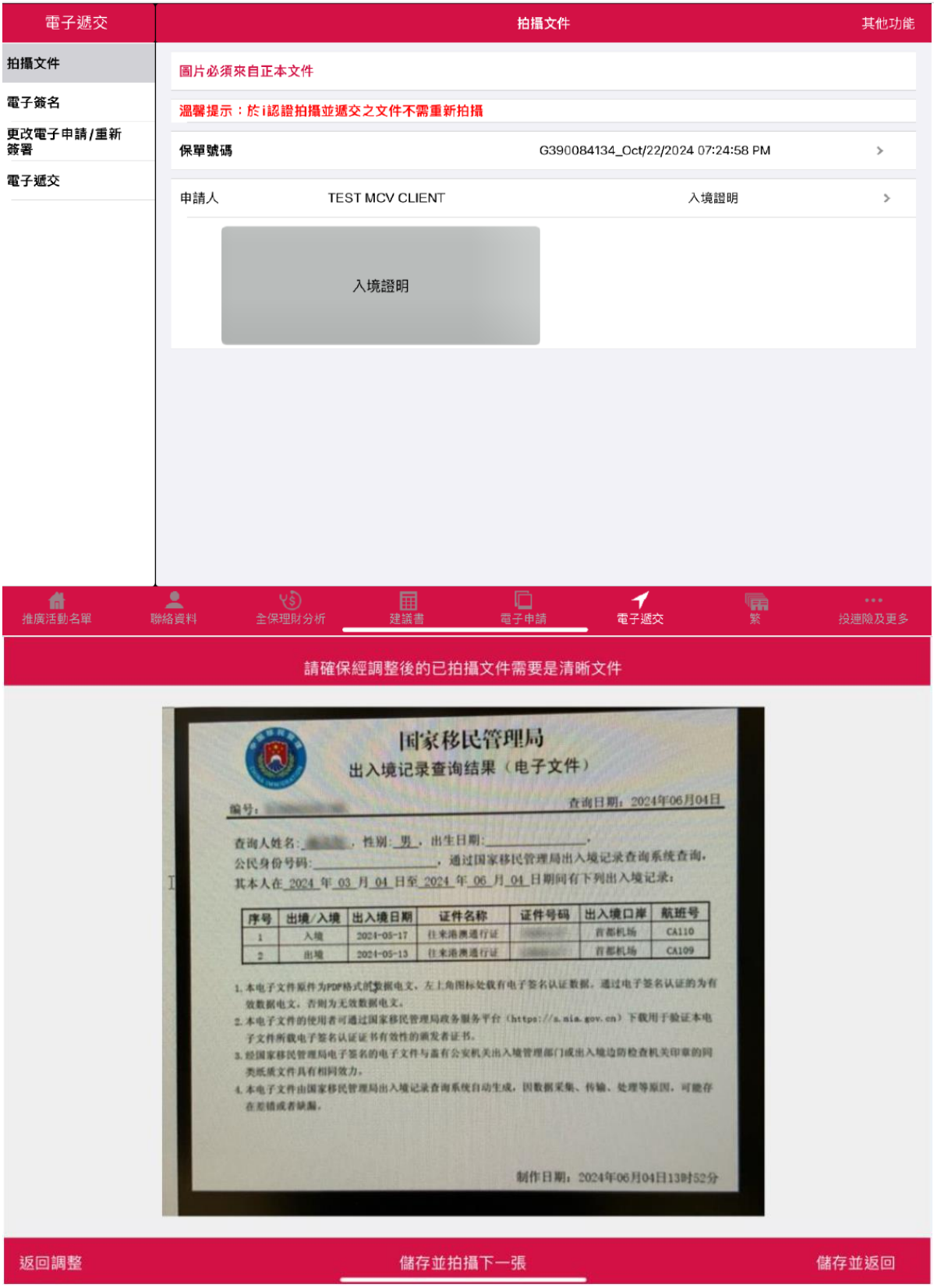
透過i認證提交客戶的出入境記錄演示 Demonstration of submitting entry and exit record via iVerify



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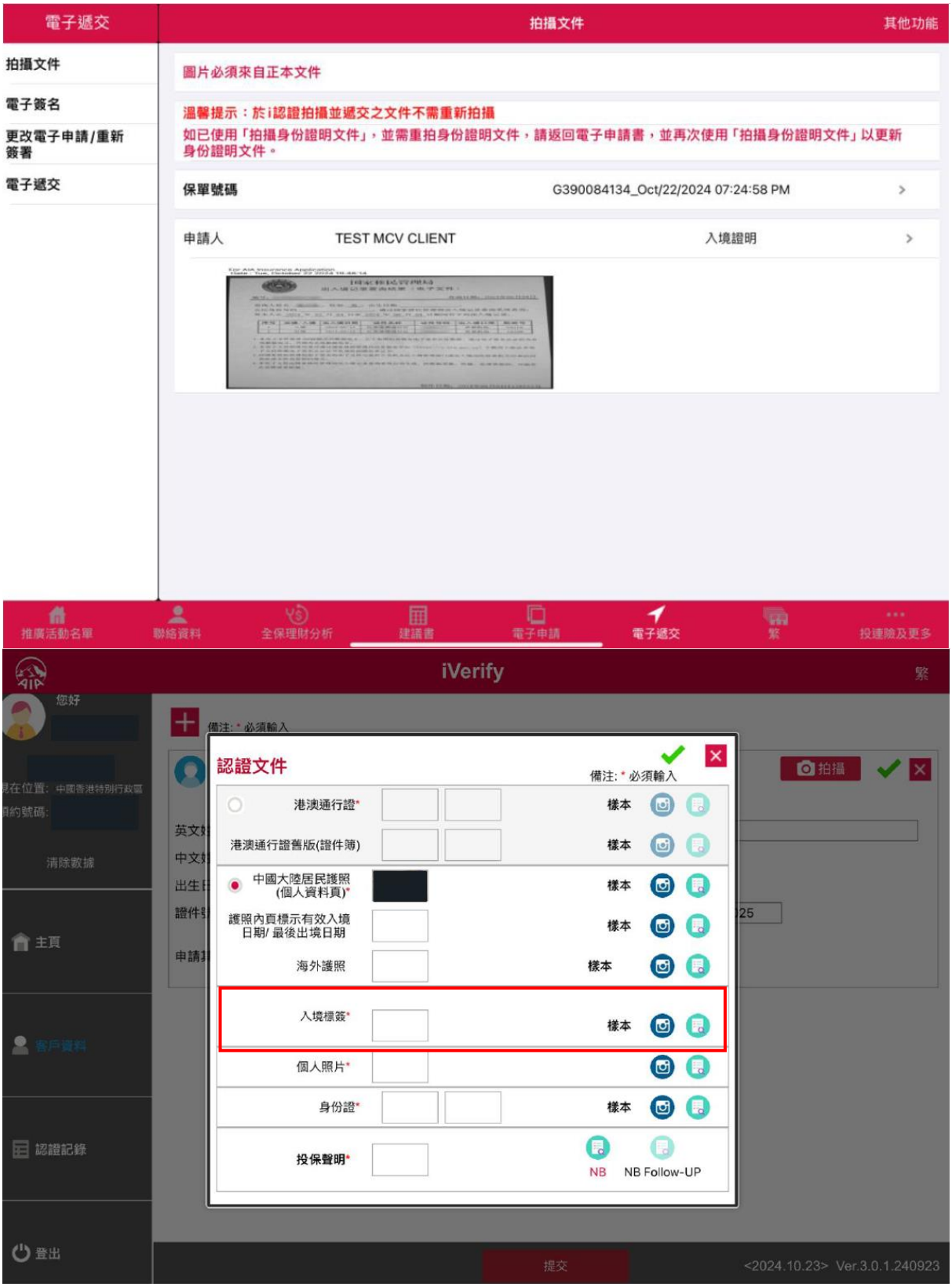

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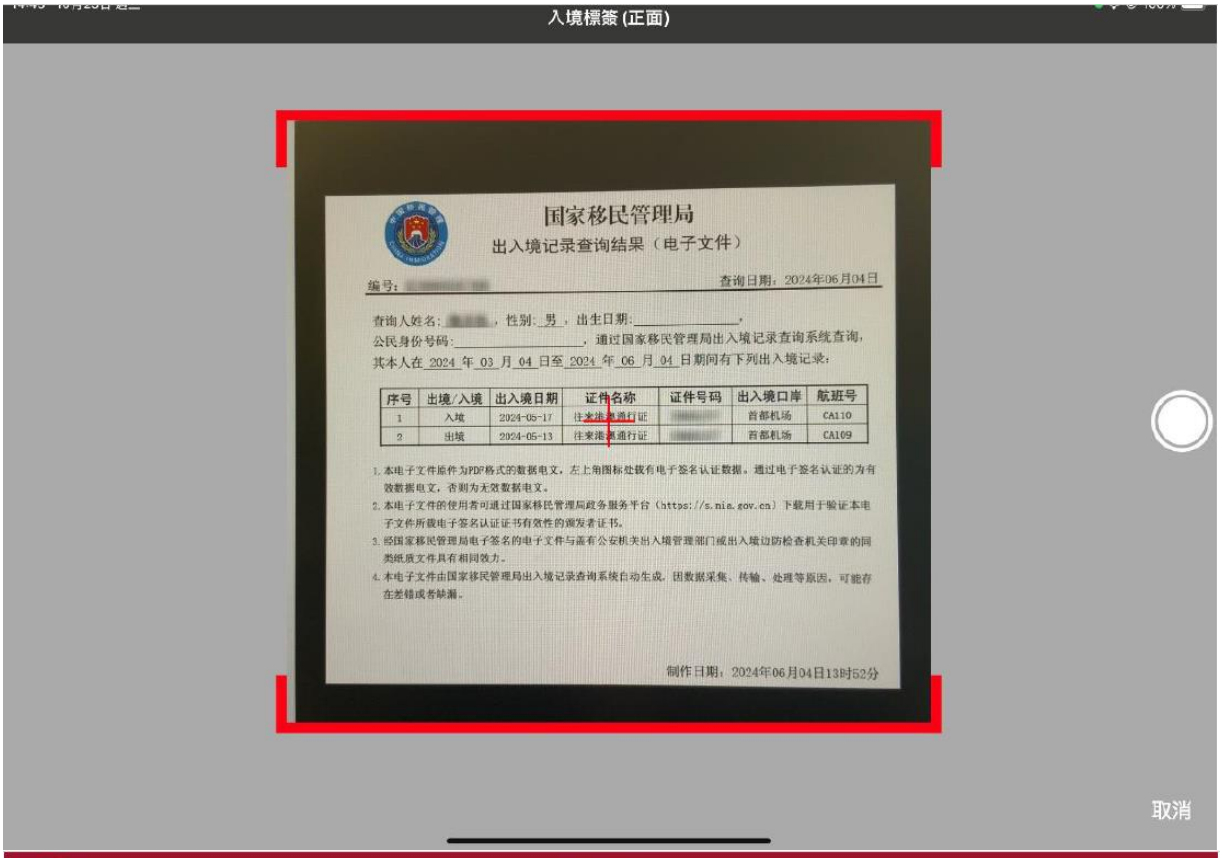



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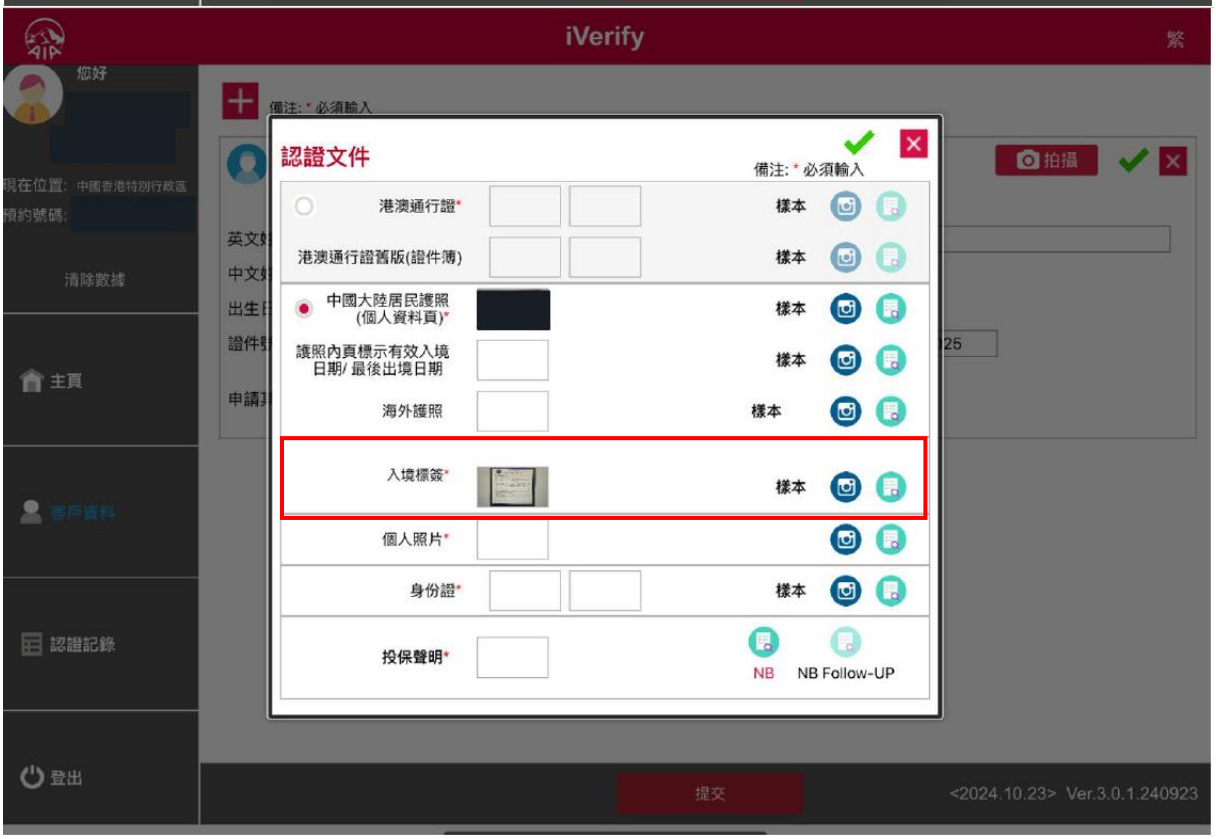

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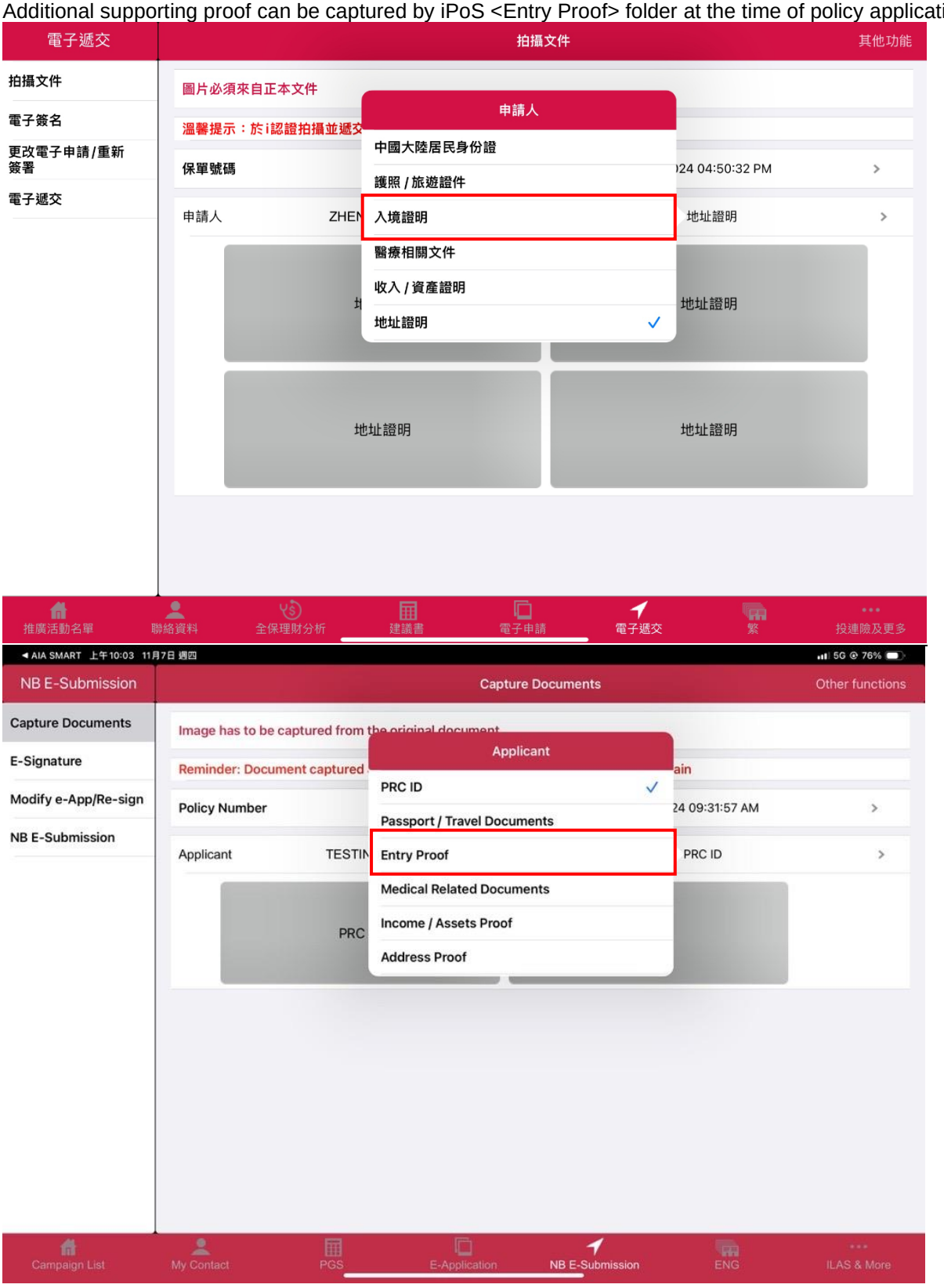
額外證明文件可於提交保單申請時透過iPoS <入境證明>文件夾提交
Additional supporting proof can be captured by iPoS <Entry Proof> folder at the time of policy application



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