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183 Electric Road
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# Memo

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|---|---|---|---|
| Attn: | All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau) | From: | May Leung |
| Copy: | Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / Ms. Amelie Shen / All Department Heads / ABDD Executives / CSBD Executives / CS IVS Executives | Dept: | Corporate Solutions |
| Date: | 06 December 2024 | Total pages: | 4 + Appendix |

Subject: **(A241223)「友心意」醫療保障計劃 2 及「友愛護」癌症保障計劃 — 「特別投保安排」**
**StepUp Medical Protection Plan 2 & Shield Up Cancer Protection Plan – "Special Enrolment Arrangement"**

**好消息！「友心意」醫療保障計劃 2（「友心意 2」）及「友愛護」癌症保障計劃（「友愛護」）「特別投保安排」**自推出以來深受歡迎，現決定**推出新一輪推廣期**，以讓更多合資格成員可以在推廣期內隨時投保！推廣期內**投保「友心意2」更可享首年 9 折保費優惠**！機會難逢，立即把握 IVS 銷售良機！

**「友心意2」「特別投保安排」**詳情如下：

| | |
|---|---|
| **推廣期：** | **2024 年 12 月 1 日**至 **2025 年 4 月 30 日** |
| **合資格客戶：** | AIA 團體醫療保險計劃成員<br>（AIA 團體醫療保險計劃並不包括自選或附加保障之計劃，以及擁有 AIA 團體醫療保險計劃的公司須於投保及 / 或最新保單週年日時擁有 8 名或以上全職僱員） |
| **優惠內容：** | 合資格成員在推廣期內可**隨時投保^「友心意 2」，毋須醫療核保，並享有首年 9 折保費優惠***！<br><br>^ 毋須於以下指定時段內投保：i) 新入職僱員及其家屬：於他們的 AIA 團體醫療保險計劃之保障生效日起 60 日內；或 ii) 現有僱員及其家屬：於 AIA團體醫療保險計劃的「保單周年日」起的 60 日內。<br>* 優惠受有關條款及細則約束，詳情請參閱產品簡介。營業員必須持有卷二 [一般保險] 牌照（只適用於香港營業員）及已完成「友心意」醫療保障計劃 2 產品線上學習課程及內部牌照評測（路徑：iAcademy > 網上學習 > 內部牌照 > 企業業務產品 >「友心意」醫療保障計劃 2 產品線上學習課程及內部牌照評測）。 |
| **推廣範本：** | **最新「友心意 2」推廣電郵範本及宣傳海報範本已上載至營業員專頁**，以供營業同事隨時下載並分享給僱主 / 人力資源部，讓其轉發給僱員，**掌握最新客戶優惠**。<br><br>路徑： eAC > 部門資訊 > 企業業務部 > 僱員福利友邦業務代表專區 > 營業員活動概覽 > 營銷推廣 > Worksite Marketing > Worksite Marketing 推廣工具<br><br>1) **「友心意 2」推廣電郵範本—人力資源部版本**（附件 1.1）<br>2) **「友心意 2」推廣電郵範本—僱員版本**（附件 1.2）<br>3) **「友心意 2」宣傳海報範本**（附件 1.3） |
| **成員網上投保步驟：** | 詳情請參閱附件 2。 |
| **營業員 iPoS 填表步驟：** | 詳情請參閱附件 3。 |

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**「友愛護」「特別投保安排」**詳情如下：

| | |
|---|---|
| **推廣期：** | 2024 年 12 月 1 日至 2025 年 4 月 30 日 |
| **合資格客戶：** | 1) AIA 團體保險計劃僱員成員及 / 或;<br>2) AIA 強積金計劃 / 職業退休計劃 / 澳門退休金計劃^僱員成員<br><br>^ AIA強積金計劃及AIA職業退休計劃只適用於香港。AIA澳門退休金計劃只適用於澳門。 |
| **推廣範本：** | **最新「友愛護」推廣電郵範本已上載至營業員專頁**，以供營業同事隨時下載並分享給僱主 / 人力資源部，讓其轉發給僱員，**掌握最新客戶優惠**。<br><br>**只適用於團體保險成員**：<br>路徑： eAC > 部門資訊 > 企業業務部> 僱員福利友邦業務代表專區 > 營業員活動概覽 > 營銷推廣 > Worksite Marketing > Worksite Marketing 推廣工具<br><br>1) **「友愛護」推廣電郵範本—人力資源部版本**（附件 4.1）<br>2) **「友愛護」推廣電郵範本—僱員版本**（附件 4.2）<br><br>**只適用於退休金成員**：<br>路徑： eAC > 相關鏈接 > MPF > 工具 > 常用資訊<br><br>1) **「友愛護」推廣電郵範本—人力資源部版本**（附件 4.3）<br>2) **「友愛護」推廣電郵範本—僱員版本**（附件 4.4） |
| **成員網上投保步驟：** | 詳情請參閱附件 5。 |

*營業員必須已完成「友愛護」癌症保障計劃線上學習及內部牌照評測

（路徑：iAcademy > 網上學習 > 內部牌照 > 企業業務產品 >「友愛護」癌症保障計劃線上學習及內部牌照評測）

如有任何查詢，歡迎與負責貴區之企業業務營業拓展部同事 / IVS 團隊聯絡。

祝 業務蒸蒸日上！

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**Good News!** "Special Enrolment Arrangement" of **StepUp Medical Protection Plan 2 ("StepUp 2")** and **Shield Up Cancer Protection Plan ("Shield Up")** were well received since their launch. We have now decided to **launch a new round of promotion period**, allowing more eligible members enrol any time during the promotion period. Enrolling "StepUp2" during the promotion period can even **enjoy a 10% premium discount for the first year.** This opportunity is too good to miss! Seize the IVS sales opportunities now!

Details of "**StepUp 2**" "**Special Enrolment Arrangement**" are as follows:

| | |
|---|---|
| **Promotion Period:** | 1 December 2024 to 30 April 2025 |
| **Eligible Customers:** | Members under an AIA group medical insurance scheme<br>(AIA group medical insurance scheme does not include voluntary or top-up policies and the company with the AIA group medical insurance scheme is required to have a minimum of 8 full-time employees at policy application and/or on the latest policy anniversary date) |
| **Offer details:** | Eligible members can **enrol "StepUp 2" at any time**^ during the promotion period **without the requirement of medical underwriting and enjoy a 10% premium discount* for the first year**!<br><br>^ Not required to apply during the following designated periods: i) New join employees and their dependents: Within 60 days after their coverage effective date of an AIA group medical insurance scheme; or ii) Existing employees and their dependents: Within 60 days after the policy anniversary of an AIA group medical insurance scheme.<br>* The offer is subject to relevant terms and conditions, please refer to the product brochure for details. Financial Planners must hold Paper 2 [General insurance] Licence (Applicable to Hong Kong Financial Planners Only) and have completed the StepUp Medical Protection Plan 2 Online Training and Internal License Test (Path: iAcademy > eLearning Training > Internal License > Corporate Solutions Product > StepUp Medical Protection Plan 2 Online Training and Internal License Test). |
| **Promotion Templates:** | **The latest "StepUp 2" Promotion Email Templates and Poster Template have been uploaded to eAC** for you to download at any time and share them with employers or Human Resources Departments so that they can forward it to employees **to keep abreast of the latest customer offers**.<br><br>Path: eAC > Departments > Corporate Solutions > Employee Benefits Representative's Corner > Agency Activities > Marketing > Worksite Marketing > Worksite Marketing Tool<br><br>1) **"StepUp 2" Promotion Email Template – HR Version** (Appendix 1.1)<br>2) **"StepUp 2" Promotion Email Template – Employee Version** (Appendix 1.2)<br>3) **"StepUp 2" Promotion Poster Template** (Appendix 1.3) |
| **Member Online Application Flow:** | Please refer to Appendix 2 for details. |
| **Financial Planner iPoS Form Filling Steps:** | Please refer to Appendix 3 for details. |

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Details of "Shield Up" "Special Enrolment Arrangement" are as follows:

| | |
|---|---|
| **Promotion Period:** | 1 December 2024 to 30 April 2025 |
| **Eligible Customers:** | 1) AIA group insurance scheme employee members and /or;<br>2) AIA MPF / ORSO / Macau pension scheme^ employee members<br><br>^ AIA MPF and AIA ORSO schemes are only applicable to Hong Kong. AIA Macau pension scheme is only applicable to Macau. |
| **Promotion Templates:** | The latest "Shield Up" Promotion Email Templates have been uploaded to eAC for you to download at any time and share them with employers or Human Resources Departments so that they can forward it to employees to keep abreast of the latest customer offers.<br><br>**Only Applicable to Group Insurance Members**:<br><br>Path: eAC > Departments > Corporate Solutions > Employee Benefits Representative's Corner > Agency Activities > Marketing > Worksite Marketing > Worksite Marketing Tool<br><br>1) "Shield Up" Promotion Email Template - HR Version (Appendix 4.1)<br>2) "Shield Up" Promotion Email Template - Employee Version (Appendix 4.2)<br><br>**Only Applicable to Pension Members:**<br><br>Path: eAC > Useful Links > MPF > Tools > Useful Information<br><br>1) "Shield Up" Promotion Email Template - HR Version (Appendix 4.3)<br>2) "Shield Up" Promotion Email Template - Employee Version (Appendix 4.4) |
| **Member Online Application Flow:** | Please refer to Appendix 5 for details. |

*Financial Planners must have completed the Shield Up Cancer Protection Plan Online Training and Internal License Test

(Path: iAcademy > eLearning Training > Internal License > Corporate Solutions Product > Shield Up Cancer Protection Plan Online Training and Internal License Test)

If you have any questions, please contact your designated CSBD Agency executives / IVS Team.

We wish you every success!

Yours faithfully,

May Leung
Head of IVS Business Development
CS – Individual Voluntary Solutions

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