AIA Hong Kong

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
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Memo

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

From: Stephen Chan

Dept: MCV Business Development

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

Date : 9 December 2024

Total page : 6

Subject : (A241227) 更新抵港內地人士轉介開立東亞銀行戶口
Updates on BEA Bank Account Opening for MCV Customers in Hong Kong

好消息！自推出轉介抵港內地人士開設立東亞銀行戶口以來，反應熱烈。
由2024年12月9日開始，各財務策劃顧問可透過iBooking System (iBS) 進行預約，並2024年12月16日起增設星期一時段供客人選擇。名額有限，先到先得

預約詳情及須知如下：

	星期一至星期五	每個時段名額
1	09:30am - 10:00am	3
2	10:00am - 10:30am	3
3	10:30am - 11:00am	3
4	11:00am - 11:30am	3
5	11:30am - 12:00pm	3
6	12:00pm - 12:30pm	3
7	12:30pm - 01:00pm	3

1. 地點：尖沙咀財駿中心
2. 每個時段為30分鐘
3. 預約時段適用於星期一至五上午 9:30 至下午 12:30 每天名額 21 個
4. 開戶服務只接受已預約之抵港內地客戶
5. 開戶基本所需文件：（個別開戶所需文件由東亞銀行決定）
    - 護照/往來港澳通行證；
    - 有顯示 “住宅地址” 的身份證；或 最近 3 個月內的銀行月結單
    - 入境標籤
6. 客戶須預留時間當天下午親臨銀行分行領取開戶文件及銀行卡，時間地點由銀行職員決定

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如有查詢，財務策劃顧問可透過電郵 與 以下同事聯絡。

聯絡人	電郵
Mr Karmil Chan	Karmil-ky.chan@aia.com
Ms Jojo Lee	Jojo-sy.lee@aia.com
Ms Casper Yip	Casper-kw.yip@aia.com

Good news! Since the launch of Bank of East Asia account opening program for Mainland customers, the response has been overwhelming. Starting from December 9, 2024, all financial planners can make appointments through the iBooking system (IBS). Moreover, a new timeslot on Monday will be added from December 16, 2024 onwards. Number of timeslots are limited and available on a first-come, first-served basis.

Booking details are as follows:

	Monday to Friday	Quota for each timeslot
1	09:30am – 10:00am	3
2	10:00am – 10:30am	3
3	10:30am – 11:00am	3
4	11:00am – 11:30am	3
5	11:30am – 12:00pm	3
6	12:00pm – 12:30pm	3
7	12:30pm – 01:00pm	3

1. Location: AIA Wealth Select Centre, TST
2. Each timeslot for 30 mins
3. Timeslots are available from Monday to Friday 9:30 am – 12:30 pm with total 21 bookings maximum per day.
4. The account opening service is only available to Mainland customers who have made an appointment in advance ONLY.
5. Basic required documents (The documents required are determined by BEA)
    - Passport / China Travel Permit; and
    - Address Proof
        a) PRC ID card with “current residential address” or
        b) Bank statements issued within the latest 3 months.
    - Landing Slip
6. Customers must reserve time to go to the bank to collect account opening documents and bank cards on the same day. The time and branch office are determined by BEA.

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For inquiries, Financial Planners can contact below colleagues via email.

Contact Person	Email
Mr Karmil Chan	Karmil-ky.chan@aia.com
Ms Jojo Lee	Jojo-sy.lee@aia.com
Ms Casper Yip	Casper-kw.yip@aia.com

Best regards,



Stephen Chan
MCV Business Development

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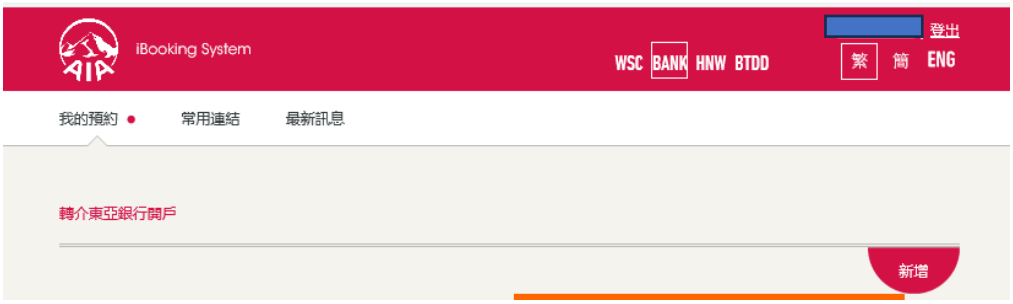
附件
Appendix

使用 iBS 預約處理程序:
Use iBS to process the situation:

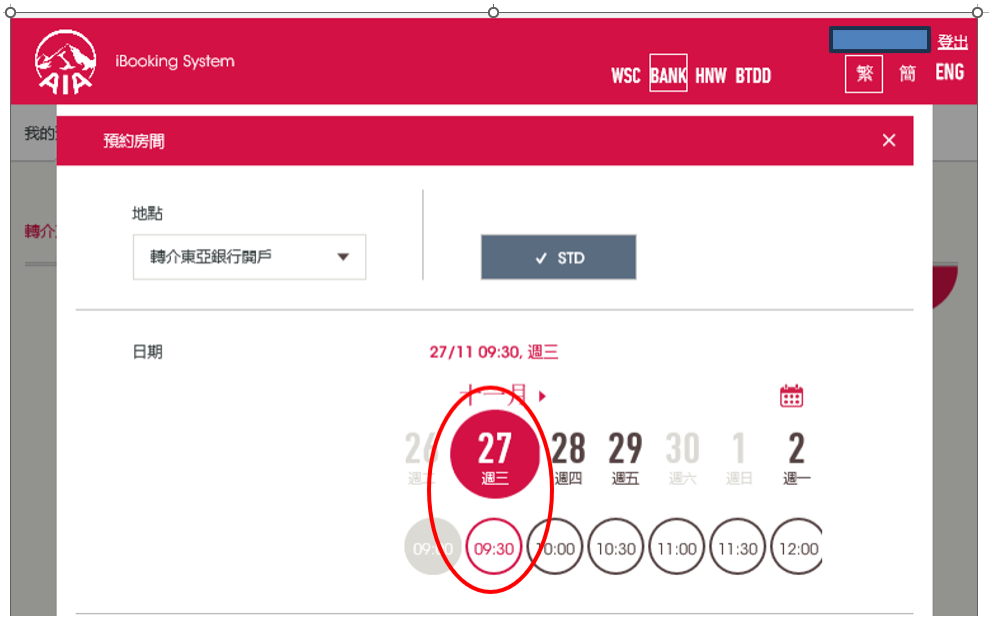
1. 登入 iBS 系統後，可於右上方點選“ BANK”，轉介東亞銀行開戶畫面便會出現，供財務策劃顧問點選“新增” 安排預約

   Logging in to the IBS system, please click the "BANK" at the upper right corner, and the screen recommending the Bank of East Asia to open an account will appear to click “Add” to schedule an appointment.



2. 先為客戶點選預約日期及時間

   Select the booking date and time.



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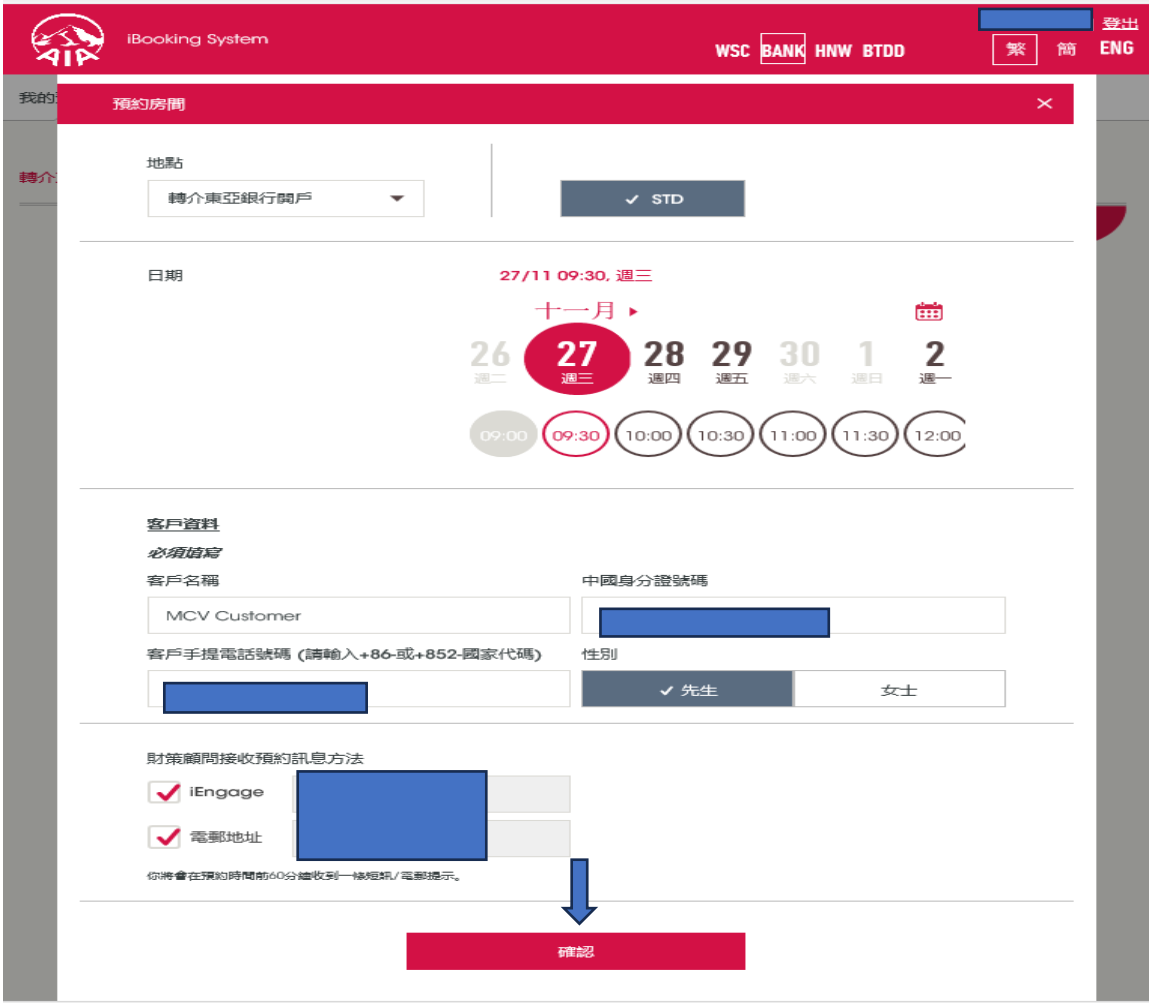
3. 預約時必須提供客戶名稱、中國身分證號碼、性別及客戶手提電話號碼，其後按"確認"便完成。財務策劃顧問亦會收到電郵確認該申請。

   Must providing of customer's identity information (Full name, PRC ID no, contact mobile no and gender) when make the appointment., and then click "Confirm" to complete the booking. The Financial Planner will receive an email to confirm the appointment.



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4. 如須取消或/更改預約時，請於頁面點選需要更改的預約後進行“更改”或“刪除”。

   If the appointment needs to be cancelled or change your reservation. Please click on the reservation you want to change on the screen and click “change” or “delete”.





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