AIA Hong Kong
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Attn:	EDDAs / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners	Dept:	Premier MDRT Development Department
Co/Dept:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / Ms. Amy Chan / All Department Heads / ABDD Executives		
Date:	10 January 2025	Total Page:	9 pages

Subject: **(A250145) 2025 年「卓越顧問」要求及獎賞**
2025 "Premier Advisor" Qualification Requirements and Recognition

「卓越顧問」自 2022 年推出，一直為友邦香港及澳門業務發展的重要策略，目的是要財務策劃顧問由以往「以銷售產品為中心」轉型至「以客戶為中心」的全方位銷售，同時善用數碼工具，提升生產力及達到持續性的 MDRT。

發展至 2024 年，全公司近**四分之一**的財務策劃顧問已達成 2024 年「卓越顧問」要求，成績實在令人鼓舞！踏入 2025 年，我們進一步完善了「卓越顧問」的要求，鼓勵「卓越顧問」積極擴闊新客源及深化現有客戶關係，貫切「以客戶為中心」的核心思想，提高客戶數目。

有關「卓越顧問」的要求及獎賞詳情，請參閱下文。財務策劃顧問亦可以透過 iEngage 或 AIA Smart 的 iPA 了解「卓越顧問」的達標進度。如有任何疑問，請聯絡營業拓展部。

成為「卓越顧問」是持續性完成 MDRT 的成功關鍵。讓我們一起努力，**以客戶為先 卓越領先！**

We are pleased to announce **"2025 Premier Advisor Qualification Requirements and Recognition"**. Please refer to the captioned memo for contest details. For enquiries, please contact ABDD.

Best Regards,

Donna Cheung
Head of Premier MDRT Development Department
DC/nt/cc/al

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2025 年「卓越顧問」要求

資格要求
所有財務策劃顧問及營業單位主管

符合資格計算年期
2025 年 1 月 1 日至 12 月 31 日

符合資格之規則

「卓越顧問」要求

1. 全方位業務

- 成功完成銷售最少各一張以下之保單:
  - i. 儲蓄保單；及
  - ii. 保障保單；及
  - iii. 投資相連壽險計劃 或 藍十字一般保險保單[a] 或 CS–退休金個人業務保單[c] (三選一)

2. 非重複受保人 – 以下方法二選一:

更新 Updated

方法一	方法二
18 位非重複受保人 [b]，當中包括: • 10 位全新受保人；及 • 8 位受保人投保 AIA Vitality 特選保險產品或指定醫療、危疾或意外保險產品 [d]	24 位非重複受保人 [b]，當中包括: • 8 位受保人投保 AIA Vitality 特選保險產品或指定醫療、危疾或意外保險產品 [d]

- 新受保人須從來未向該名財務策劃顧問購買保單或成為該名財務策劃顧問的強積金個人賬戶客戶/澳門央積金個人賬戶
- 受保人凡為新/現有受保人完成銷售 1 張新 Life 或 PA 保單 (計算保單字頭包括 “B”, “G”, “M” & “P”) 代表成就 1 位受保人，每 1 個強積金個人賬戶計算為 1 位受保人，本銷售年度內重複銷售予同一受保人，亦只計算為 1 位受保人
- 若 2 位營業員共同為同 1 位受保人完成銷售同 1 張新保單 (joint case)，該受保人將以 0.5 名分別計算予 2 位營業員
- 若同 1 位受保人分別為 2 位營業員，各投保 1 張新保單，該受保人將以 1.0 位分別計算予 2 位營業員

a. 藍十字繕發的所有一般保險保單，涵蓋旅遊保險、個人保險及商業保險均獲計算在內。所有有關藍十字一般保險之要求不適用於澳門。
b. 包括強積金個人賬戶客戶; 藍十字一般保險保單客戶將不被計算在內。

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c. CS–退休金個人業務保單及強積金個人賬戶客戶計算詳情請參考以下列表:

方案	計劃類別	資產轉移/供款	計算為認可客户
1	新開的優悠樂賬戶	收到由其他託管人轉移的資產	Y
2	新開的優悠樂賬戶	收到由 AIA 強積金賬戶轉移的資產	N
3	現有的優悠樂賬戶	收到由其他託管人轉移的資產	Y
4	新開的可扣稅自願供款賬戶 (TVC)	收到供款	Y
5	現有的可扣稅自願供款賬戶 (TVC)	收到新供款	N
6	新開的自僱人士賬戶	收到供款	Y
7	新開的自僱人士賬戶	尚未收到供款	N
8	現有的自僱人士強積金賬戶	收到新供款	N
9	僱員現職的強積金供款帳戶	收到新供款	N
10	新 / 現有強積金僱主賬戶	收到供款	N
11	新開的澳門央積金個人賬戶	收到供款或轉移的資產	Y

註：方案 1 ~ 10 只適用於香港而方案 11 只適用於澳門

d. AIA Vitality 特選保險產品 或 指定醫療、危疾或意外保險產品見下表:

更新 Updated

Selected Medical, Critical Illness, and Accident Products	指定醫療, 危疾及意外保險產品	產品適用於香港客戶: Product applicable to HK Customers	產品適用於澳門客戶; Product applicable to Macau Customers
Cancer Guardian 3 series (CG3)	癌症全方位保障 3 系列 (CG3)	Y	Y
Cancer Guardian Pearl 3 series (CGP3)	癌症全方位明珠保障 3 系列 (CGP3)	Y	Y
Health Journey Guardian series (HJG)	「全程守護健康保」系列(HJG)	Y	N
AIA Voluntary Health Insurance Privilege Ultra Scheme Series (AVPU)	AIA 自願醫保尊耀計劃系列 (AVPU)	Y	N
Privilege Ultra Medical Plan Series (PU)	「尊耀」醫療計劃系列 (PU)	N	Y
Privilege Ultra Pearl Medical Plan Series (PUP)	「尊耀明珠」醫療計劃系列 (PUP)	Y	Y
AIA Voluntary Health Insurance Flexi Scheme series (AVF)	AIA 自願醫保靈活計劃系列 (AVF)	Y	N
AIA Voluntary Health Insurance Standard Scheme series (AVS)	AIA 自願醫保標準計劃系列 (AVS)	Y	N
CEO Medical 5 series (CEO5)	至尊醫療計劃 5 系列 (CEO5)	Y	Y
CEO Pearl Medical 5 series (CEOP5)	至尊明珠醫療計劃 5 系列 (CEOP5)	Y	Y
GBA Health Connect Outpatient Plan Series (GBAOP)	「大灣醫薈通」門診計劃系列 (GBAOP)	Y	Y
OptimaCEO Medical Series (OPCEO)	極臻•至尊醫療計劃系列 (OPCEO)	Y	Y
OptimaCEO Pearl Medical Series (OPCEOP)	極臻•至尊明珠醫療計劃系列 (OPCEOP)	Y	Y

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Metro-Trio Medical and Critical Illness Protection Plan series (MT)	「都市三保」醫療危疾保障計劃系列 (MT)	Y	Y
Metro-Trio Pearl Medical and Critical Illness Protection Plan series (MTP)	「都市三保明珠」醫療危疾保障計劃系列(MTP)	Y	Y
Here For You Refundable Hospital Cash (ROPHC) (Basic plan)	「常伴您」保費退還住院現金保障(ROPHC)(基本計劃)	Y	Y
Here For You Refundable Surgical Cash (ROPSC) (Basic plan)	「常伴您」保費退還手術現金保障(ROPSC)(基本計劃)	Y	Y
Super Good Health Medical Plan 2 series(SGH2)	特級「健康之寶」醫療保障計劃 2 系列 (SGH2)	Y	Y
Flexi-MediGuard (FLEXI-MG) (Basic plan)	靈活住院惠益保障計劃 (FLEXI-MG)(基本計劃)	Y	Y
Individual Medical Plan (IMP80) (Basic plan)	「倍無憂」醫療保障計劃(IMP80)(基本計劃)	N	Y
AIA One Absolute - Cancer & Serious Infectious Disease Protection series	AIA 唯一摯保 - 癌症及嚴重傳染病保障系列	Y	Y
AIA One Absolute - Full Protection series	AIA 唯一摯保 - 全面保障系列	Y	Y
AIA One Absolute Pearl - Cancer & Serious Infectious Disease Protection series	AIA 唯一摯保明珠 - 癌症及嚴重傳染病保障系列	Y	Y
AIA One Absolute Pearl - Full Protection series	AIA 唯一摯保明珠 - 全面保障系列	Y	Y
AIA Assemble	「自在自選」危疾保	Y	Y
Cancer Care Essence	智護癌症保	Y	Y
EasyGuard Care Essence	守康易危疾保	Y	Y
Executive Care Pro 2	泰然安心保 2	Y	N
Lady Care Pro	「摯愛您」保障計劃	Y	Y
Level-Up Protect Cancer Plan	「進添」計劃 - 癌症保障	Y	Y
Level-Up Protect Pearl Cancer Plan	「進添明珠」計劃 - 癌症保障	Y	Y
Multiple Care Pro 2	多重安心保 2	Y	N
On Your Side Plan series	愛伴航系列	Y	Y
Prime Care Pro 2	進泰安心保 2	Y	N
Simple Care Essence	簡護危疾保	Y	Y
Simple Care Essence Pearl	簡護危疾明珠保	Y	Y
Smart Elite Ultra	多重智倍保	Y	N
Super Health Guard Pro	進升危疾保障計劃	Y	Y
105 PREMIUM REFUND – AMR	105 保費回贈 - 意外醫療保障	Y	Y
Grand VIP	「豐逸行」	Y	Y
HERE FOR YOU REFUNDABLE\ACCIDENT PLUS	「常伴您」保費退還意外升級保障	Y	Y
PREMIUM REFUND - \ACCIDENTAL HI	保費回贈 - 意外住院入息保障	Y	Y

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Silvery Protect	銀意保	Y	Y
Super Adults Shield (SAS)	「盛年意家保」	Y	Y
Super Kids Shield (SKS)	「童年意家保」	Y	Y
Super Seniors Shield (SSS)	「豐年意家保」	Y	Y
XTRA PROTECT	「添意保」	Y	Y
PAC Select 3	自選人身意外保險 3	Y	Y

*如同一位受保人於本年投保 AIA Vitality 特選保險產品及指定醫療、危疾或意外保險產品，只會被計算為 一位非重複受保人。
**如以上產品提供附加契約版本，該附加契約產品亦能納入計算。
***公司於 2025 年推出的 AIA Vitality 特選保險產品或以上指定醫療、危疾或意外保險產品的新版本，亦可納入計算。公司將審視以上列表並適時更新。

3. 使用數碼工具 100 次，當中必需包括以電郵發送最少 24 次 iFHC 報告予非重複的準客戶或現有客戶以完成保單年度的檢討

- iChange：按保單服務申請次數計算# (每天最多計算 1 次)
- CRM：按登錄日數計算 (每天最多計算 1 次)
- iPA：按登錄日數計算 (每天最多計算 1 次)
- iSay：按客戶回覆 (讚好/留下聯絡資料) 計算 (每位客戶最多計算 1 次)
- iFHC：2025 年度建立及以電郵發送 iFHC 報告至非重複的準客戶或現有客戶，即每一位客戶或準客戶只計算 1 次

更新 Updated

#指定保單服務申請包括：更改通訊地址 / 聯絡電話 / 電郵地址 /「友邦電子通知書」申請、「轉數快/電子入賬服務」申請、友邦電子通知書申請及更改服務營業員申請。公司作為持有人之保單 (Company case) 、信託保單 (Trust case) 、以任何形式轉讓 (Assignment policy) 、以圖章 (Stamp) 及指紋 (Fingerprint) 作為簽署的保單類別申請除外。

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2025 年入職之新晉財務策劃顧問的「卓越顧問」要求

1. **達到所有「全方位業務」的要求；及**
2. **其他的「卓越顧問」要求將根據入職月份訂立 (見下表):**

更新 Updated

入職月份	一月	二月	三月	四月	五月	六月	七月	八月	九月	十月 – 十二月
全方位業務										
受保人	18	17	15	14	12	11	9			
Vitality或指定醫療、危疾及意外保險產品受保人	8	8	7	6	6	5	4			
iFHC 報告	24	22	20	18	16	14	12	10	8	6
數碼工具使用量	100	92	84	75	67	59	50	42	34	25

2025 年「傑出卓越顧問」要求

1. **達到2025年「卓越顧問」要求； 及**
2. **達到「MDRT 2026」要求及成功登記為「MDRT 2026」會員； 及**
3. **擁有最少2位高淨值客戶^**

^高淨值客戶：於 2025 年度內，同一位客戶 (保單持有人) 透過同一位營業員，成功投保 AIA 個人保險計劃 (「新保單」)，保單(扣除任何合資格折扣前 (如適用) 的累計之年繳保費達 10 萬美元或一次性繳付保費達 100 萬美元。

2025 年「卓越顧問」獎項及嘉許

卓越殊榮及體驗

1. **「卓越顧問」獎賞**
   - 可列印 AIA 集團設計之「卓越顧問」標誌於卡片上
   - 特設「卓越顧問」官方網站專頁，表揚成為「卓越顧問」的財務策劃顧問
   - 「卓越顧問」專屬獎賞及嘉許
   - 「卓越顧問」區域競賽
   - 「卓越顧問」獎牌

2. **「卓越顧問」專屬聚會活動**

3. **優先服務**
   - 「百萬圓桌」 及「卓越顧問」尊屬查詢服務
     友邦營業員專頁 → 電子服務 → 預約回電及營運服務中心系統
   - iChat 服務

4. **「傑出卓越顧問」專屬: 銅鑼灣希慎廣場「友邦峻宇財富管理中心」預約服務***
   *需符合指定資格，便可獲得「友邦峻宇財富管理中心」預約配額，於中心內與高淨值客戶會面及享用專業範疇服務

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2025 "Premier Advisor" Qualification Requirements

Eligibility
All Hong Kong and Macau Financial Planners & Agency Leaders

Qualifying Period
1 January to 31 December 2025

Qualification Rules

2025 "Premier Advisor" Requirements

1. Provide full range of business

- At least 1 of each approved policy of
  - i. Savings Plan; AND
  - ii. Protection Plan; AND
  - iii. Unit-linked Business Plan OR Blue Cross General Insurance Business [a] OR CS – Pension Retail Case [c] (Select one from three)

2. Distinct Insured Customers – select one from both options below:

Option 1	Option 2
Accumulate 18 Distinctive Insured Customers [b], including: • 10 New Insured Customers; AND • 8 distinct Insured customers purchasing Vitality series products OR Selected Medical, Critical Illness or Accident products [d].	Accumulate 24 Distinctive Insured Customers [b], including: • 8 distinct Insured customers purchasing Vitality series products OR Selected Medical, Critical Illness or Accident products [d].

更新 Updated

- New insured customers should not have previously purchased any policy from respective financial planner. New insured customers should also not have been an MPF Personal Account/ Macau CPF Individual Plan customer of the respective financial planner.
- 1 approved Life or PA Policy (with prefix "B", "G", "M" & "P" will be counted) during the contest period from new/existing Insured Customer is equivalent to 1 Insured Customer. Insured Customer from 1 approved MPF Personal Account is equivalent to 1 Customer, repeated sales to the same Insured Customer during the current sales year are considered as 1 Insured Customer.
- If the new policy (of same Insured) is a joint-case completed by 2 agents, Insured Customer count for these 2 agents will be 0.5 respectively.
- If the same Insured Customer purchases 1 new policy from 2 distinct agents separately, Insured Customer count for these 2 agents will be 1.0 respectively.

a. All general insurance policies issued by Blue Cross, including travel insurance, personal insurance and commercial insurance will be counted. All updates related to Blue Cross general insurance requirement does not apply to Macau Financial Planners.
b. Include MPF customers*; Blue Cross General Insurance Business customer count is excluded.

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c. CS – Pension Retail Case and customers calculation details refer to below table:

Scheme	Category	Asset Transfer / Contribution	Valid Customer
1	New MPF Personal Account	With assets transferred from other trustee	Y
2	New MPF Personal Account	With assets transferred from AIA MPF account	N
3	Existing MPF Personal Account	With assets transferred from other trustee	Y
4	New TVC Account	With contribution	Y
5	Existing TVC account	With contribution	N
6	New MPF Self-Employed Account	With contribution	Y
7	New MPF Self-Employed Account	Contribution not yet received	N
8	Existing MPF Self-Employed Account	With contribution	N
9	Employee's MPF contribution Account	With contribution	N
10	New / Existing Employer's MPF Account	With contribution	N
11	New Macau CPF Individual Plan	With contribution	Y

***Scheme 1 – 10 for HK agents only. Scheme 11 for Macau agents only**

d. The list of Vitality series products OR Selected Medical, Critical Illness or Accident products included as follows:

更新 Updated

Please refer to P. 3 – 5 of this memo for the product list.

* If an insured customer purchases both Vitality series products AND Selected Medical, Critical Illness or Accident products in the year, he/she will be considered as ONE distinct customer only.
** If an above product also offers Rider version, the rider policy will also be counted.
*** Vitality series products or new versions of above selected Medical, Critical Illness or Accident products launched in 2025 can also be counted. The list above will be updated from time to time.

3. Use digital tools for 100 times, including 24 iFHC reports generated and sent to distinct prospects or existing customers via email to provide annual review

- iChange: by no. of designated Policy Service requests[#] (max. 1 time per day)
- CRM: by no. of login day (max. 1 time per day)
- iPA: by no. of login day (max. 1 time per day)
- iSay: by no. of leads ("like" the content or fill in the contact form) generated (max. 1 count per customer)

更新 Updated

- iFHC: iFHC report generated and sent within 2025 to distinct prospect or existing customers via email, each customer or prospect will be counted one time only

[#]Designated iChange policy service requests include: Change of Address / Telephone Numbers / Email Address / Apply "AIA e-Advice", Application of FPS / e-BankIn, eAdvice Service Registration, Change of Servicing Agent). Except for Company as owner, Trust, Assignment policy, Stamp and Fingerprint as signature cases.

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"Premier Advisor" Requirements for Financial Planner Contracted in 2025

1. **Fulfil all "full range of business; AND**
2. **Fulfil all the other "Premier Advisor" requirements on pro-rata basis according to the contracted month (see below table):**

更新 Updated

Contracted Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct-Dec
Full Range of Business										
Insured Customers	18	17	15	14	12	11	9			
Customers who purchased Vitality or selected Medical, Crticical Illness or Accident Products.	8	8	7	6	6	5	4			
iFHC Reports	24	22	20	18	16	14	12	10	8	6
TDA Usage	100	92	84	75	67	59	50	42	34	25

2025 "Elite Premier Advisor" Requirements

1. **Fulfill 2025 "Premier Advisor" requirements; AND**
2. **Fulfill "MDRT 2026" requirements and register "MDRT 2026" membership; AND**
3. **With at least 2 high-net-worth customers^**

^High-net-worth customer: In 2025, same customer (policy owner) applies for individual AIA life insurance plan ("New Policy") with the same agent, with total annualized premium for policy(ies) (before any eligible discount, if any) meeting at least US$100,000 or US$1,000,000 for one-time premium payment.

2025 "Premier Advisor" Rewards and Recognition

"Premier Advisor" Honor and Experiences

1. **"Premier Advisor" Rewards**
   - "Premier Advisor" Logo display on business card
   - A special web page on AIA official website to honor "Premier Advisor"
   - "Premier Advisor" exclusive rewards and recognition
   - "Premier Advisor" District Awards
   - "Premier Advisor" Plaque

2. **Invitation to "Premier Advisor" exclusive events**

3. **Priority Service**
   - Access to "MDRT" & "Premier Advisor" exclusive enquiry services (Agency Corner → eServices → Outbound Call and Centre Pre-booking System)
   - iChat services

4. **"Elite Premier Advisor" Exclusive: Booking of "AIA Wealth Management Centre" at Hysan Place Causeway Bay***
   * Premier Advisors who fulfilled the requirements are entitled for the booking quota of "AIA Wealth Management Centre" to meet HNW customers and enjoy the provided professional services .

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