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Memo

Attn.:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)	**From:**	Amy Chan & Leo Cheung
		Dept.:	ABDD & Life & Wealth Management Proposition
Copy:	Mr. Alger Fung / Ms. Amy Chan / Ms. Alice Liang / Ms. Melissa Wong / Mr. Louie Ho / Mr. Chris Lau / All Department Heads / Heads of Agency Division / BPs / Call Centre	**Total pages:**	1 page + Appendix
Date:	24 January, 2025		

Subject: **A250192** **<u>活享儲蓄計劃：售後跟進電話</u>**
<u>FlexiAchiever Savings Plan: Post-Sale Calls</u>

「活享儲蓄計劃」 自 1 月 8 日推出以來受到熱烈支持。由於產品於現金提取方面提供更大靈活性，公司將抽樣安排售後跟進電話予成功投保「活享儲蓄計劃」之保單持有人，以確認其對產品的了解。售後跟進電話將新增 2 條問題（請參閱附件之新增講稿）。

請將以上訊息傳達予屬下的營業同事，如有任何查詢，請經 iEngage/PES 使用 Chatbot 進行查詢。

「活享储蓄计划」 自 1 月 8 日推出以来受到热烈支持。由于产品于现金提取方面提供更大灵活性，公司将抽样安排售后跟进电话予成功投保「活享储蓄计划」之保单持有人，以确认其对产品的了解。售后跟进电话将新增 2 条问题（请参阅附件之新增讲稿）。

请将以上讯息传达予属下的营业同事，如有任何查询，请经iEngage/PES使用Chatbot进行查询。

Since the launch of FlexiAchiever Savings Plan on 8 January, Company has received an overwhelming response. In view of the enhanced withdrawal flexibility, Company shall impose sampling post-sale call for the clients who successfully subscribed FlexiAchiever Savings Plan to ensure their understanding. 2 additional questions will be included to the post-sale call. Please refer to appendix for details of the additional script.

Please convery the above message to your fellow agents. Should you have any queries, please make enquiry through Chatbot in iEngage/ PES.

Amy Chan
Chief Agency Officer

Leo Cheung
Head of Life & Wealth Management Proposition

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Appendix: Additional Call Script
附件：新增講稿

To confirm agent has provided and explained product information sheet 確認前線同事有提供及解釋產品資料概要	
	請問於銷售過程中，財務策劃顧問/業務代表是否有提供同埋講解產品資料概要? During the selling process, had your Financial Planner/Technical Representative provided and explained you the KEY FACT SHEET of this product?
To confirm client's understanding on guarantee and non-guarantee values 確認客戶了解保證及非保證價值	
	呢個計劃係包括紅利，而紅利係非保證。假如你進行現金提取，當中很大部分為非保證既紅利。實際提取的現金金額將根據實際應支付之非保證利益而可能有所不同，並可能會高於或低於保單銷售說明文件中所示的金額。呢點你都清楚啊? Bonuses are included in this plan and bonuses are non-guaranteed. If you withdraw cash from the policy, there are significant part of the portion is non-guaranteed bonuses. The actual cash withdrawal amount may vary according to the actual non-guaranteed benefit payable, which may be higher or lower than those illustrated in the benefit illustration document. Do you understand this part?

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