友邦香港
香港北角電氣道 183 號
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AIA Hong Kong
12/F, AIA Tower
183 Electric Road
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Hong Kong

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners	From:	Victor Man
Copy:	Mr. Alger Fung / Ms. Amy Chan / Ms. Amelie Shen / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Agency Executives	Dept:	Corporate Solutions
Date:	05 February 2025	Total pages:	4

Subject: **(A250219) 第一季退休金現金獎賞 - 開門紅（香港）**
2025 Q1 Pension Retail Incentive (Hong Kong)

提提您!為鼓勵各營業同事開發更多退休金商機；企業業務（CS）於 2025 年 1 月以「開門紅」打響頭炮，推出**「第一季退休金現金獎賞 - 開門紅」（香港）**鼓勵各營業同事刷新 2025 年好業績，擴展更多個人業務機遇！請把握機會，贏取更多獎賞！

競賽要求及獎賞詳情如下：

競賽日期	2025 年 1 月 1 日 (星期三) 至 2025 年 2 月 28 日 (星期五)
競賽資格	所有持有強積金附屬中介人牌照的營業同事
合資格業務	**退休金個人個案**[1-3]
合資格計劃	「休悠樂」個人賬戶計劃（MPFPA）及客戶尊享強積金個人賬戶計劃（PDM）
獲獎資格	於競賽期內遞交及於2025年3月31日 (星期一) 或之前成功完成**指定退休金個人個案**，可得**現金獎賞高達HK$18,888**
獎賞	

退休金個人個案	現金獎賞*
1宗	HK$188
3宗	HK$688
6宗	HK$1,888
9宗	HK$2,888
10宗	HK$3,388
10宗以上	每宗額外HK$500現金賞

***現金獎賞上限為HK$18,888。**

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一般規則及要求：

1. 只適用於退休金個人個案
2. 合資格的退休金個人個案如下:

   香港區:

   - 包括「休悠樂」個人賬戶計劃(MPFPA)及客戶尊享退休金個人賬戶計劃 (“PDM”)
   - **合資格退休金個人個案（Unique Identification – UID）**只計算每宗於推廣期內成功遞交紙本或 iPoS P(P) / P(M) / P(C) 的表格至 AIA 企業業務部，該資產轉移並須於 2025 年 3 月 31 日或之前完成。

   - 於推廣期內，以同一香港身份證號碼（UID）登記之賬戶，只計算為一宗退休金個人個案。
   - **合資格退休金個人個案（Unique Identification – UID）**只計算每宗於推廣期內成功遞交至 AIA 企業業務部的「休悠樂」個人賬戶計劃(MPFPA)、客戶尊享強積金個人賬戶計劃(“PDM”)之表格，該資產轉移並須於 2025 年 3 月 31 日或之前完成。

   - 營業同事於從事退休金銷售及推廣活動，以及為有關退休金計劃提供意見時，必須正確地為客戶填選最新之相關申請表格，以獲得客戶以書面及明示同意該註冊退休金中介人將就有關個案所獲得之金錢利益及 / 或非金錢利益。詳情請參閱通告 A240263。
3. 如果合資格個案屬共同個案（即個案由 2 名營業同事共同完成），每名營業同事將獲計算 0.5 宗個案。且個案不會以四捨五入方式計算。獎賞將按比例平均分配。
4. 所獲之獎賞不得轉讓或轉換成現金。得獎營業同事必需於發放獎賞期間仍與公司維持有效合約關係，方能獲取獎賞。
5. AIA 保留就調整後之得獎結果及就任何違規銷售行為追討已發放獎賞之權利。
6. AIA 保留隨時修改本競賽規則或獎賞之權利，恕不另行通知。
7. 如有任何爭議，AIA 保留最終決定權。

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聯絡。

祝　業務蒸蒸日上！

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Good News! To encourage all financial planners to develop more business opportunities, Corporate Solutions (CS) will kick off 2025 with a "Red Opening" by launching the **"1st Quarter Pension Retail Case Cash Rewards – Red Opening" (Hong Kong)**. This aims to motivate all financial planners to refresh their performance for 2025. Please seize this opportunity to win more rewards!

The Contest requirements and rewards are as follows:

Contest Period	1 January 2025 (Wed) – 28 February 2025 (Fri)
Eligibility	All MPF Licensed Financial Planners
Qualifying Business	Pension Retail Cases[1-3]
Qualifying Plans	AIA MPF Personal Account ("MPFPA") and Preferential Personal Account ("PDM")
Qualifying Criteria	During the Contest period, eligible Financial Planners submitted Pension Retail Case(s) and successfully settled on or before 31 March, 2025 can earn **cash rewards up to HK$18,888**
Rewards	See table below

Pension Retail Case	Cash Rewards*
1 case	HK$188
3 case(s)	HK$688
6 case(s)	HK$1,888
9 case(s)	HK$2,888
10 case(s)	HK$3,388
More than 10 case(s)	Additional HK$500 cash reward for each case

*The maximum limit of cash rewards is HK$18,888.

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General Rules & Requirement:

1. Eligible to Pension Retail Case(s) only.
2. Eligible Pension Retail Case(s):
   Applicable to Hong Kong:
   - AIA Pension Personal Account ("MPFPA"), Preferential Personal Account ("PDM")
   - Qualified Pension Retail Cases (Unique Identification – UID) are only counted for each successful paper or iPoS submission of P(P) / P(M) / P(C) form to AIA Corporate Solutions from other trustees during the Challenge Period and the Asset Taken Over ("ATO") must be settled on or before 31 March, 2025.
   - During the Challenge Period, only one Pension Retail Case will be counted for each HKID number (UID) registered.
   - Qualified Pension Retail Cases (Unique Identification – UID) will be counted for each Pension Retail case with completed form is submitted to AIA Corporate Solutions during the Promotion Period from external trustees to an AIA MPF Personal Account ("MPFPA") or Preferential Personal Account ("PDM") and the ATO must be settled on or before 31 March, 2025.
   - When Financial Planners are conducting Pension sales and marketing activities and giving advice in relation to Pension schemes, you must correctly complete the latest relevant application forms for your customers in order to obtain their written and express consent to the monetary and/or non-monetary benefits to be received by the registered Pension intermediary in respect of the relevant cases. For details, please refer to memo A240263.
3. If the qualifying case is jointly closed by 2 producers, 0.5 case will be counted for each producer. Case count calculation will not be rounded-up. The reward will be shared proportionally.
4. Rewards are non-transferrable and cannot be exchanged for cash. The winners must be in-force with AIA at the time of reward distribution in order to receive reward.
5. AIA reserves the right to retract the rewards awarded in respect of the adjusted results of final sales report and for any sales violations.
6. AIA reserves the right to amend the rules or rewards of this challenge at any time without prior notice.
7. In case of any disputes, AIA reserves the right for any final decision.

If you have any questions, please contact your designated business development executives.

We wish you every success!

Victor Man
Head of CS Business Development
Agency Distribution, Corporate Solutions

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