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Memo

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

Dept: Premier MDRT Development Department

Copy : Mr. Alger Fung/ Ms. Amy Chan/
All Department Heads / ABDD Executives

Date : 1 March 2025

Total page : 2

Subject : (A250309) 友邦峻宇財富管理中心新增專業範疇服務- 售後核保查詢
New Professional services of AIA Alta Wealth Management Centre – Post-sales Underwriting Enquiry

友邦峻宇財富管理中心將於2025年3月，於現有專業範疇服務新增一個項目 - 售後核保查詢。

為了讓使用中心會客室的財務策劃顧問能向高淨值客戶提供更佳的服務及更好的體驗。財務策劃顧問可於預約服務時，選取新增的專業範疇服務 - 售後核保查詢(只適用於年度化保費達不少於10萬美元或一次性繳付保費達 100萬美元)。

財務策劃顧問與高淨值客戶於中心會面後，將新保單號碼即場提供給中心同事或24小時內自行於iBS填寫新保單號碼，以便核保部同事跟進優先核保及售後核保查詢。

當核保跟進事項發出後，可於iBS選取會面當日預約記錄，點選<請求回電>(只限14天內)，核保部同事將會回電給相關同事，讓保單批核的過程更快更暢順。

如有任何查詢，請電郵至友邦峻宇財富管理中心 aia_wm_ctr@aia.com。

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AIA Alta Wealth Management Center are pleased to announce a new professional service will be launched in March 2025 - Post-sales Underwriting Enquiry.

To fully support our Financial Planners to provide better services and better experience to high-net-worth customer, Financial Planners can select a Post-sales Underwriting Enquiry (at least ANP US$100,000 or US$1,000,000 for one-time premium payment only) when booking on iBooking System (iBS).

After meeting with high-net-worth clients at the center, Financial Planners need to provide the new policy number to center's Customer Service Associate or input the newly submitted policy number in iBS within 24 hours after booking by themselves. Dedicated team will follow up at soonest.

After the pending requirement is issued, Financial Planners can retrieve the appointment record in iBS, choose "Request Callback" (within 14 days only). Dedicated team will call back at soonest.

For inquiries, please contact AIA Alta Wealth Management Centre aia_wm_ctr@aia.com.

Best Regards,



Donna Cheung
Premier MDRT Development Department
DC/kl/cc

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