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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 : (A250318) 友邦峻宇財富管理中心預約配額2025
AIA Alta Wealth Management Centre – Booking Quota 2025

友邦峻宇財富管理中心預約配額於2025年已作出調整，區域總監及合資格財務策劃顧問2025年之預約配額如下:

區域總監及合資格財務策劃顧問^	2025年 預約配額(次)
區域執行總監及榮譽顧問、區域執行總監、高級資深區域總監、資深區域總監、區域總監	30
TOT^	30
COT^	20
MDRT^	10
Elite Premier Advisor^	15
(新增)擁有一年或以上行業經驗^	5
(新增)友邦精英學院行政優才發展計劃^	3
(新增)高端人才通行證計劃^/優秀人才入境計劃^	3
(新增)高淨值業務財務策劃顧問^	2

^當相關名單更新時，合資格財務策劃顧問名單亦將作相應更新。

- 所有財務策劃顧問亦可登入 iBS 向區域總監申請預約配額。
- 區域總監及所有財務策劃顧問亦可隨時登入iBS 查閱個人預約配額及使用次數。

若財務策劃顧問擁有多於一項資格，將以可獲之較高預約配額次數為準。
例子：如區域總監A 同時擁有 TOT 資格，區域總監A於2025年可享之預約配額為30次。

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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The booking quota of AIA Alta Wealth Management Center has been adjusted in 2025. The quota entitlement for District Directors and Eligible Financial Planners in 2025 is as follows:

District Directors and Eligible Financial Planners^	Quota Entitlement in 2025 (No. of Booking)
EDDA, EDD, PSDD, SDD, DD	30
TOT^	30
COT^	20
MDRT^	10
Elite Premier Advisor^	15
(New) Industry LOU^	5
(New) AIAPA-EDP^	3
(New) Top Talent Pass Scheme^/ Quality Migrant Admission Scheme^	3
(New) HNW Advisor^	2

^Upon announcement of the new lists, eligible financial planner list will be refreshed accordingly.

- All financial planners can logon to iBS to apply for booking quota from their District Directors.
- District Directors and all financial planners can anytime logon to iBS to view the individual booking quota and usage record.

If a financial planner is entitled to more than one qualification above, he/she will be assigned the higher quota entitled by the qualification.
Example: If District Director (DD) A is also a TOT, District Director (DD) A will be entitled to 30 booking quotas in 2025.

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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