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Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only)	From:	Victor Man
Copy:	Mr. Alger Fung / Ms. Amy Chan / Mr. Louie Ho / Amelie Shen / All Department Heads / ABDD Executives / Contact Centre	Dept:	Corporate Solutions
Date:	04 March 2025	Total pages:	2

Subject: **(A250326)** 2025「Double-up 退休金資產轉移」獎賞
2025 "Double-up Pension Asset Taken Over" Rewards

AIA MPF 至強獎賞大放送！迎接積金易來臨，企業業務（CS）強勢推出 **2025「Double-up 退休金資產轉移」獎賞**，鼓勵各營業同事，以強積金開拓更多生意，躋身 MDRT！請把握機會，贏取**更多獎賞**！

獎賞詳情如下：

推廣期	2025 年 3 月 1 日 至 6 月 30 日
參加資格	所有持有強積金牌照營業同事
合資格業務個案	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）
獲獎資格及獎賞	於推廣期內，只要**成功完成指定個案[1-3]數目**（詳情見下表）， 1. 將可獲得相應資產轉移獎賞之**「Double-up」獎賞** 2. 如果 **90% 或以上之總完成之個案[1-3]透過電子形式遞交**（iPoS / 網上轉移強積金資產），則將獲得**額外電子獎賞**

個案數目	現有首年佣金	「Double-up」獎賞	額外電子獎賞	總首年佣金+獎賞
<10	0.50%	0%	0%	0.50%
10-19	0.50%	0.10%	0.01%	0.61%
20-39	0.50%	0.20%	0.02%	0.72%
≥40	0.50%	0.50%	0.05%	**1.05%**

於推廣期內完成 40 宗或以上個案

首年佣金+獎賞最高可達 1.05%

★ 佣金 Double-up ★

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例子

個案		現有首年佣金	「Double-up」獎賞	額外電子獎賞	總首年佣金+獎賞
個案數目	90% 或以上個案透過電子形式遞交				
<10	×	0.50%	0%	-	0.50%
<10	√	0.50%	0%	0%	0.50%
10-19	×	0.50%	0.10%	-	0.60%
10-19	√	0.50%	0.10%	0.01%	0.61%
20-39	×	0.50%	0.20%	-	0.70%
20-39	√	0.50%	0.20%	0.02%	0.72%
≥40	×	0.50%	0.50%	-	1.00%
≥40	√	0.50%	0.50%	0.05%	1.05%

一般規則及要求：

1. 合資格的退休金個人個案如下：
   - 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 企業業務部或使用網上轉移強積金資產服務之合資格個案，該資產轉移並須於 2025 年 7 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。
2. 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。
3. 如退休金個人個案（UID）已於「第一季退休金現金獎賞 - 開門紅（香港）」（通告 A250219）計算在內，該個案(UID)將不會再計入本次獎賞。
4. 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。
5. 獲獎賞之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。
6. AIA 保留就調整後之獲獎賞結果及就任何違規銷售行為追討已發放獎賞之權利。
7. AIA 保留隨時修改本競賽規則或獎賞之權利，恕不另行通知。
8. 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或經 iEngage / PES 使用 LiveChat 查詢。

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Superb AIA MPF reward program! To prepare for eMPF era, Corporate Solutions (CS) is excited to launch **2025 "Double-up Pension Asset Taken Over" Rewards** to encourage Financial Planners to drive more life insurance business opportunities from MPF business and become MDRT! Seize the opportunity to **get more rewards**!

Reward details are as follows:

Promotion Period	1 March – 30 June 2025
Eligibility	All MPF Licensed Financial Planners
Qualifying Business	Pension Retail Case[1-3]
Qualifying Plans	AIA MPF Personal Account ("MPFPA") and Preferential Personal Account ("PDM")
Qualifying Criteria and Rewards	During the promotion period, as long as the **specified number of cases**[1-3] (See the table below for details) **are successfully completed**, 1. **Double-up Bonus** will be rewarded according to the Asset Taken Over 2. **Additional E-bonus** will be rewarded if **90% or more of cases**[1-3] **settled are submitted via E-submission** (i.e. iPoS / Online MPF assets transfer)

Case Settled	Current First Year Commission (FYC)	Double-up Bonus	Additional E-bonus	Maximum FYC + Bonus
<10	0.50%	0%	0%	0.50%
10-19	0.50%	0.10%	0.01%	0.61%
20-39	0.50%	0.20%	0.02%	0.72%
≥40	0.50%	0.50%	0.05%	**1.05%**

Complete 40 or more cases within the promotion period to

earn up to 1.05% FYC + Bonus

★ Commission Double-up ★

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Example

Case		Current First Year Commission (FYC)	Double-up Bonus	Additional E-Bonus	Total FYC + Bonus
Case Settled	90% or more of case settled are submitted via E-submission				
<10	×	0.50%	0%	-	0.50%
<10	√	0.50%	0%	0%	0.50%
10-19	×	0.50%	0.10%	-	0.60%
10-19	√	0.50%	0.10%	0.01%	0.61%
20-39	×	0.50%	0.20%	-	0.70%
20-39	√	0.50%	0.20%	0.02%	0.72%
≥40	×	0.50%	0.50%	-	1%
≥40	√	0.50%	0.50%	0.05%	1.05%

General Rules and Requirement:

1. Eligible Pension Retail Case(s):
   - 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 or using Online MPF assets transfer service of eligible case during the Promotion Period and the Asset Taken Over ("ATO") must be settled on or before 31 July, 2025.
   - During the Promotion Period, only one Pension Retail Case will be counted for each HKID number (UID) registered.
2. 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.
3. If the Pension Retail Case (UID) is already counted in the "2025 Q1 Pension Retail Cash Rewards (Hong Kong)" (memo A250219),the UID will not be counted in this incentive reward.
4. 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.
5. The awarded Financial Planners must be in-force with AIA at the time of reward distribution in order to receive reward.
6. AIA reserves the right to retract the rewards awarded in respect of the adjusted results of final sales report and for any sales violations.
7. AIA reserves the right to amend the rules or rewards of this promotion at any time without prior notice.
8. In case of any disputes, AIA reserves the right for any final decision.

If you have any questions, please contact your designated CS business development executives or enquire by using LiveChat in iEngage/PES.

Yours faithfully,

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

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