**友邦香港**
香港北角電氣道 183 號
友邦廣場 12 樓

**AIA Hong Kong**
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

# Memo

| | | | |
|---|---|---|---|
| Attn: | All EDD & Honourable Advisors / EDDs / PSDDs/ SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau) | From: | May Leung |
| Copy: | Mr. Alger Fung / Ms. Amy Chan / Mr. Louie Ho / Ms. Amelie Shen / All Department Heads / ABDD Executives / CSBD Executives / CS IVS Executives / Contact Centre | Dept: | Corporate Solutions |
| Date: | 21 March 2025 | Total pages: | 4 |
| Subject: | **(A250367) IVS「友得揀」Double「Up」獎賞 2025**<br>**IVS Double "Up" Reward 2025** | | |

**好消息！**IVS「友得揀」獎賞一浪接一浪。企業業務（CS）誠意推出 **IVS Double「Up」獎賞 2025**。於競賽期內，只要成功遞交及繕發指定數目的 **1.「友心意」醫療保障計劃 2** 及/或 **2.「友愛護」癌症保障計劃**，每張保單將可獲得相應**現金獎賞**。**獎賞無上限！**

立即行動，幫助客戶填補保障缺口，同時贏取**現金獎賞**！

競賽詳情如下：

| | |
|---|---|
| **參加資格** | 所有香港及澳門財務策劃顧問及營業單位主管(以個人業績計算) |
| **競賽日期** | **2025 年 3 月 17 日至 4 月 30 日** |
| **合資格產品** | 1.**「友心意」醫療保障計劃 2**^<br>2.**「友愛護」癌症保障計劃**^*<br><br>^有關投保資格詳情，請參閱通告 A241223<br>*營業同事如有合資格團體保險客戶，可於友邦營業員專頁製作二維碼及連結，並透過電郵發送至指定人力資源部電郵地址，讓其公司員工**直接透過二維碼 / 連結簡易投保「友愛護」癌症保障計劃**。詳情請參閱通告 A250212 |
| **獲獎要求及獎賞** | 於競賽期內，**成功遞交及繕發合資格產品[1]保單數目**，每張保單將可獲得相應**現金獎賞**。<br>詳情見下表： |

| 合資格產品保單數目 | 保單現金獎賞 |
|---|---|
| 1 – 4 張 | 每張HK$ 100 |
| 5 張或以上 | 每張HK$ 200 |

**獎賞例子**

| 合資格產品保單數目 | 保單現金獎賞 | 總現金獎賞 |
|---|---|---|
| 0.5 | 不適用 | 不適用 |
| 2 | 每張HK$ 100 | HK$ 200 |
| 2.5 | 每張HK$ 100 | HK$ 200 |
| 4 | 每張HK$ 100 | HK$ 400 |
| 4.5 | 每張HK$ 100 | HK$ 400 |
| 5 | 每張HK$ 200 | HK$ 1,000 |
| 5.5 | 每張HK$ 200 | HK$ 1,000 |
| 8 | 每張HK$ 200 | HK$ 1,600 |
| 8.5 | 每張HK$ 200 | HK$ 1,600 |

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**一般規則及要求：**

1) 合資格產品只計算合資格企業業務成員以保單持有人或受保人身份經以下途徑購買「友心意」醫療保障計劃 2 及 / 或「友愛護」癌症保障計劃：
   - 合資格強積金 / 退休金企業成員：經現有負責該強積金 / 退休金企業帳戶之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買
   - 合資格團體保險計劃成員：經現有負責該團體保險計劃之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買

   而且此企業業務成員 (i) 於投保前上一個日曆月的最後一天、於投保及保單繕發時應為現有友邦強積金 / 退休金 成員；或 (ii) 於投保及保單繕發時應為現有友邦團體保險成員。

   有關投保資格詳情，請參閱通告 A241223 。
2) 所有由現有保單轉換 / 退保後由同一受保人或同一持有人持有之保單的保單數目將不獲計算。
3) 若兩位或以上之營業單位主管 / 財務策劃顧問共同完成 1 張保單，將平均計算予各人。競賽期完結時，若保單數目總數為點數，數目將下調為整數計算。
4) 營業同事遞交保單申請予 AIA，應預留充足時間遞交以確保有關申請於競賽期內獲繕發。
5) 營業同事進行銷售時必須根據客戶的需要及保費負擔能力作評估，從而介紹適合的保險產品，不得因獎賞而對客戶作特定銷售建議。
6) 有關截數日之安排，以 AIA 最新的通告或最新的 iPoS 截數日安排為準。
7) 如營業同事於競賽期之前已遞交保單/保單已獲繕發，但於競賽期內撤回投保申請/ 取消保單，並再次投保相同產品計劃，其保單的數目將不獲計算。
8) 所有保單必須在競賽期內遞交及繕發並於發放獎賞時仍然生效，保單才獲計算在內。
9) 競賽結果以保單冷靜期後作調整為準。AIA 保留就調整後之競賽結果及就任何違規銷售行為追討已發放獎賞之權利。
10) 所有得獎者必須於獎賞發放時仍與 AIA 持有效合約。
11) 未經公司批準或同意，營業同事不能基於任何目的於社群媒體轉售、贈送獎賞或就獎賞舉行抽獎。
12) AIA 保留隨時修改本競賽規則或獎賞之權利，恕不另行通知。
13) 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 / IVS 團隊聯絡。

祝 業務蒸蒸日上！

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Good news! IVS rewards come one after another. Corporate Solutions (CS) sincerely launches IVS Double "Up" Reward 2025. During the Challenge Period, corresponding cash bonus will be rewarded for successfully submitting and issuing designated number of 1) StepUp Medical Protection Plan 2 and / or 2) Shield Up Cancer Protection Plan. There is no cap on the cash rewards!

Act now to help customers filling their protection gaps and win cash rewards!

Challenge details are as follows:

<table>
<tr><td>Eligibility</td><td>All Hong Kong & Macau Financial Planners and Agency Leader (By Personal Production)</td></tr>
<tr><td>Challenge Period</td><td>17 March - 30 April 2025</td></tr>
<tr><td>Qualifying Products</td><td>1. StepUp Medical Protection Plan 2^<br>2. Shield Up Cancer Protection Plan^*<br><br>^For the details of applicant eligibility, please refer to memo A241223<br>*Financial Planners can generate QR codes and URL at Agency Corner for eligible group insurance policies; and send them via email to the designated email addresses of respective Human Resources departments, enabling company employees to apply for Shield Up Cancer Protection Plan directly through QR Code or URL at ease. Please refer to memo A250212 for details</td></tr>
<tr><td>Qualifying Criteria and Rewards</td><td>During the Challenge Period, by successfully submitting and issuing designated number of 1) StepUp Medical Protection Plan 2 and / or 2) Shield Up Cancer Protection Plan, corresponding cash bonus per case will be rewarded.<br>Details are as follows:
<table>
<tr><th>No. of Qualifying Case(s)</th><th>Cash Bonus</th></tr>
<tr><td>1 - 4 Case(s)</td><td>HK$ 100 per Case</td></tr>
<tr><td>5 or more Cases</td><td>HK$ 200 per Case</td></tr>
</table></td></tr>
<tr><td>Rewards Examples</td><td>
<table>
<tr><th>No. of Qualifying Case(s)</th><th>Cash Bonus</th><th>Total Cash Bonus</th></tr>
<tr><td>0.5</td><td>NA</td><td>NA</td></tr>
<tr><td>2</td><td>HK$ 100 per Case</td><td>HK$ 200</td></tr>
<tr><td>2.5</td><td>HK$ 100 per Case</td><td>HK$ 200</td></tr>
<tr><td>4</td><td>HK$ 100 per Case</td><td>HK$ 400</td></tr>
<tr><td>4.5</td><td>HK$ 100 per Case</td><td>HK$ 400</td></tr>
<tr><td>5</td><td>HK$ 200 per Case</td><td>HK$ 1,000</td></tr>
<tr><td>5.5</td><td>HK$ 200 per Case</td><td>HK$ 1,000</td></tr>
<tr><td>8</td><td>HK$ 200 per Case</td><td>HK$ 1,600</td></tr>
<tr><td>8.5</td><td>HK$ 200 per Case</td><td>HK$ 1,600</td></tr>
</table></td></tr>
</table>

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**General Rules and Requirements:**

1) Qualifying cases are StepUp Medical Protection Plan 2 and / or Shield Up Cancer Protection Plan purchased by eligible Corporate Solutions members through the following channels:
   - Eligible MPF / Pension corporate members: Purchase through the existing Financial Planner currently responsible for the MPF/Pension corporate account, or assigned Financial Planners of the same agency unit.
   - Eligible Group insurance plan members: Purchase through the existing Financial Planner currently responsible for the group insurance account, or assigned financial planners of the same agency unit.

   and such Corporate Solutions member should be (i) an existing AIA MPF/Pension member on the last day of previous calendar month upon application, at the time of application and policy issuance; or (ii) an existing AIA Group Insurance member at the time of application and policy issuance.
   For the details of eligibility, please refer to memo A241223.
2) The relevant case count of policy changed/lapsed from existing policies of the same policyholder or insured will NOT be counted.
3) Joint policies will be shared evenly among the co-producers. Cases will be counted according to total no. of cases rounding down into an integer after completion of the challenge.
4) For policy applications submitted to AIA, Financial Planners are reminded to allow sufficient time to submit the application to ensure the policy is issued within the Challenge Period.
5) Financial Planners should make product recommendations based on customer needs and affordability. and should not make any incentive-driven recommendations to customers.
6) The arrangement of closing dates will be subject to the latest memos or iPoS closing dates announced by AlA.
7) Financial Planners who have submitted policies / policies issued before the Challenge Period but withdraw the captioned policy applications / cancel the captioned issued policies during the Challenge Period and then reapply for the same products for the same insured, the corresponding case will NOT be counted.
8) All policies will only be counted if they are submitted and delivered within the Challenge Period and are still in force during rewards awarding.
9) The result of the challenge shall be adjusted according to the cooling-off period of the policy. AlA reserves the right to retract the rewards awarded.
10) Awardees must be inforce in AlA at the time the awards are paid out.
11) Reward resale, giveaway or lucky draws via social media for any purpose are prohibited without approval or consent of AIA.
12) AlA reserves the right to amend any of the rules or rewards of this challenge at any time without prior notice.
13) In case of any disputes, AIA reserves the right for any final decision.

If you have any questions, please contact your designated CSBD Agency executives/IVS Team.

We wish you every success!

Yours faithfully,



May Leung
Head of IVS Business Development
CS – Individual Voluntary Solutions

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