AIA Hong Kong
27/F Hopewell Centre,
183 Queen's Road East,
Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	**From:**	Kenneth Luk
		Dept:	Customer and Marketing
Copy:	Mr. Alger Fung Ms. Melissa Wong All Department Heads Macau CEO / ABDD Executives	**Total pages:**	7
Date:	1 April 2025		
Subject	**A250404**	**[更新]【見面「友」禮】活動 [Update] Meet-and-Greet Delights**	

BEYOND NUMBER ONE 客戶為先 卓越領先

深化
現有客戶

與特選客戶見面，客戶可享 AIA 友 Point 自由兌換心水商戶禮券！



活動期 [更新]	2025 年 1 月 1 日至 2025 年 6 月 30 日
特選客戶 [更新]	請見以下適用客戶名單 (詳情請見附錄2)： ALMS >> • [Recapture] 2025 年 4-6 月重點客戶名單 • [Recapture] 2025 年高端客戶名單 • [優易/簡易核保] 2025 重點客戶名單 • 2025 高購買潛力客戶名單 • 2025 重新分配客戶名單 CRM / iPOS / AIA Smart >> • 【見面「友」禮】 - 特選客戶名單 • Recapture 推廣活動 - 尊貴(VIP)特選客戶 - 高端客戶名單
見面禮遇資格	以上特選客戶，於活動期內與財務策劃顧問見面，兼透過 iChange 成功更新或確認現仍有效的電郵地址或電話號碼，即可享禮遇。
見面禮遇	• 合資格客戶將可享以下禮遇一份 (「見面禮遇」)： **27,500 AIA友Point** 客戶可於 AIA+兌換心水商戶購物禮券 (約值港元/澳門幣 110 或人民幣 100) **按此參閱客戶宣傳單張**

「我們」、「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"We", "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).
只供 AIA 內部使用。/ For AIA Internal Use Only.

[AIA – INTERNAL]

AIA Hong Kong
27/F Hopewell Centre,
183 Queen's Road East,
Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

	• 每位合資格客戶只可於 2025 年度獲贈見面禮遇 1 次。 • 見面禮遇將於 iChange 記錄後的 8 星期內直接發放予合資格特選客戶之 AIA+賬戶內。財務策劃顧問須提醒客戶須向 AIA 提供正確電郵地址及手機號碼，及**於 AIA+成功連結個人保單** (按此查閱個人保單或賬戶的連結步驟)，以作見面禮遇通知及派發安排；否則，見面禮遇資格或將被取消。 • 此活動屬限額活動，額滿即止。 • 活動受條款及細則約束，詳情請參閱附錄 1。
備註	• 此活動只適用於特選客戶。財務策劃顧問於分享有關資訊予客戶前，必須確定客戶是否為合資格的特選客戶。 • 發放此見面禮遇並不涉及任何新保單之銷售或購買。 • 特選客戶須合符上述資格以享有見面禮遇。如特選客戶符合其他推廣活動，但未有符合上述資格，均不會獲發見面禮遇。 • **請注意：** a. 所有銷售活動及投保申請必須在香港或澳門境內進行。 b. 如欲邀請特選客戶進行指定財務分析，請先確認對方身處你所屬營業牌照的境內。 c. 營業員必須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及與抵港抵澳內地人士相關的工作指引。 d. 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。若特選客戶為 Opt-out 客戶，財務策劃顧問不應以此禮遇作為邀約或更新客戶資料的原因。

活動期有限，請與客人保持聯繫，深化客戶關係！

如有任何疑問，請電郵至客戶及市場策劃 (Customer and Marketing) AIAHK.CustomerExperience-ECM@aia.com

「我們」、「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"We", "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).
只供 AIA 內部使用。/ For AIA Internal Use Only.

[AIA – INTERNAL]

AIA Hong Kong
27/F Hopewell Centre,
183 Queen's Road East,
Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo



Meet and greet your customers with their chosen offer from AIA Points!



Campaign Period [Update]	From 1 Jan 2025 to 30 Jun 2025
Selected Customers [Update]	Customer lists below are all eligible to the Offer (See Appendix 2 for details): ALMS >> • (Recapture) 2025 Apr-Jun Selected Customers • ALMS >> (Recapture) 2025 High-value Customers • ALMS >> (Simplified/Preferential UW) 2025 Selected Customer • ALMS >> 2025 High propensity Customer • ALMS >> 2025 Reassigned Customer CRM / iPOS / AIA Smart >> • Meet-and-Greet Offer - Selected Customer List • Recapture Promotion – VIP Selected Customer – High-value Customer List
Offer Eligibility	The above selected customers who meet with their financial planners, and successfully update or reconfirm their existing valid email addresses or phone numbers via iChange during the Campaign Period, will be qualified to enjoy the Offer!
Offer	• Each qualified customer can enjoy the below ("Offer"): **27,500 AIA Points** Customers can redeem a variety of merchant gift vouchers valued at approximately HKD/MOP110 or RMB 100 on AIA+. Click here for the promotional leaflet • Each qualified customer can receive the Offer once only during 2025. • The Offer will be sent to AIA+ of the qualified customers within 8 weeks upon receipt of iChange record. Financial planners should remind customers to provide the correct email address and mobile number to AIA, as well as **linking individual policies in AIA+** (click here about the steps to link individual policies or accounts) for offer announcement and offer distribution purposes. **Otherwise, the eligibility to the Offer may be cancelled.** • The campaign will be ended upon meeting quota. • Terms & conditions apply. Please refer to Appendix 1 for details.

「我們」、「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"We", "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).
只供 AIA 內部使用。/ For AIA Internal Use Only.

[AIA – INTERNAL]

AIA Hong Kong
27/F Hopewell Centre,
183 Queen's Road East,
Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

Remarks	• This campaign is only applicable to the selected customers. Please check customer's eligibility before sharing the campaign information. • The distribution of the Offer does not involve any new policy sales or purchases. • The selected customers should fulfill the above criteria to enjoy the Offer. If the selected customers are qualified for other promotion(s), yet have not fulfilled the above criteria, will not be eligible for the Offer. • **Note:** a. All solicitation activities and insurance application must be conducted in Hong Kong or Macau territory ("Territory"). b. If participants are invited to conduct designated financial analysis, please confirm that the participant is in the Territory where your business license belongs. c. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants/Policyowner From MCV Business" and MCV related guidelines. d. Before contacting the policyholder, please check whether the policyholder is on the opt-out list or not. If the customers have opted out, financial planners should refrain using this offer as a reason to invite them for a meetup or update their contact information.

Limited-time customer activity! Please stay connected with your customers!
Should you have any queries, please email to Customer and Marketing at AIAHK.CustomerExperience-ECM@aia.com

Best regards,



Kenneth Luk
Head of Customer and Growth Marketing

「我們」、「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"We", "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).
只供 AIA 內部使用。/ For AIA Internal Use Only.

[AIA – INTERNAL]

AIA Hong Kong
27/F Hopewell Centre,
183 Queen's Road East,
Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

附錄 1：【見面「友」禮】活動 — 條款及細則

1. 此活動期由 2025 年 1 月 1 日至 2025 年 6 月 30 日止 (包括首尾兩天)；並以 iChange 遞交的確認紀錄 (香港時間及 AIA 之伺服器接收的時間) 作準。
2. 此活動只適用於特選保單持有人(「特選客戶」)，請見「見面「友」禮 - 特選客戶名單」。
3. 於活動期內，如特選客戶與財務策劃顧問見面，並透過 iChange 成功更新或確認現仍有效的通訊資料(電郵地址或電話號碼)，該特選客戶 (「合資格客戶」) 將獲贈 27,500 AIA 友 Point (「見面禮遇」)，客戶可於 AIA+兌換約值港元/澳門幣 110 或人民幣 100 之商戶購物禮券 。AIA 有權隨時更改 AIA+內的禮券商戶選項而無須另行通知。
4. 每位合資格客戶只可於 2025 年度獲贈見面禮遇最多 1 次。
5. 見面禮遇將於 iChange 記錄後的 8 星期內直接發放予合資格客戶之電郵或 AIA+。財務策劃顧問須提醒客戶須向 AIA 提供正確電郵地址及手機號碼，及於 AIA+成功連結個人保單 (按此查閱個人保單或賬戶的連結步驟)，以作見面禮遇派發安排；否則，禮遇資格或將被取消。
6. AIA 並不負責核實合資格客戶所提供的電郵地址及手機號碼的真確性。若合資格參加者所遞交的資料有錯漏/不正確而影響接收領獎通知，AIA 概不補發。
7. 此活動屬限額活動，額滿即止。
8. 發放此見面禮遇並不涉及任何新保單之銷售或購買。
9. 特選客戶須符合見面禮遇資格以享有見面禮遇。如特選客戶符合其他推廣活動，但未有符合見面禮遇資格，均不會獲發見面禮遇。
10. AIA 並非電子購物禮券的製造 / 供應商並不就禮品承擔任何義務和責任。由電子購物禮券引起的任何爭議均由參加者和製造商 / 供應商直接解決。電子購物禮券之使用受限於條款和細則，有關電子購物禮券使用詳情，請參閱其條款及細則。
11. AIA 對本條款及細則擁有絕對解釋權。如有任何爭議，AIA 將擁有最終決定權。

其他注意事項：

1. 財務策劃顧問不應以此禮遇作為客戶投保之誘因，及影響客戶作出知情的投保決定。財務策劃顧問向客戶推介產品前須進行財務需要分析，以評估客戶的需要及承擔能力。客戶須根據自己的需要及承擔能力以決定保費。
2. 香港及澳門財務策劃顧問只能於所屬營業牌照境內進行受規管活動。所有銷售活動及投保申請必須在香港及澳門境內進行。財務策劃顧問須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及與抵港抵澳內地人士相關的工作指引。
3. 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。如是，請勿在獲取客戶明確同意前進行直接促銷(包括促銷推廣活動的優惠)。

「我們」、「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"We", "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).
只供 AIA 內部使用。/ For AIA Internal Use Only.

[AIA – INTERNAL]

AIA Hong Kong
27/F Hopewell Centre,
183 Queen's Road East,
Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

Appendix 1: Terms & Conditions of【Meet-and-Greet Delights】Campaign

1. The period of this campaign is from 1 January 2025 to 30 June 2025, both dates inclusive. It is subject to iChange submission record (based on Hong Kong time and the time received by the AIA's server).
2. This campaign is only applicable to the selected policyholders ("Selected Customers"). Please refer to Meet-and-Greet Offer - Selected Customer List.
3. During the campaign period, if the Selected Customers meet with their financial planners, and successfully update or reconfirm their existing valid contact information (email address or phone number) via iChange, they ("Qualified Customers") can choose to enjoy 27,500 AIA Points ("Offer"), which allow Qualified Customers to redeem a variety of merchant gift vouchers valued at approximately HKD/MOP110 or RMB 100 on AIA+. AIA reserves the right to change voucher merchant options without advance notices.
4. Each Qualified Customer can receive the Offer once only during 2025.
5. The offer preference selection link and Offer will be sent to the emails or AIA+ of Qualified Customers by 8 weeks upon iChange record received. Financial planners should remind customers to provide the correct email address and mobile number to AIA, as well as linking individual policies in AIA+ (click here for the linkage guideline) for offer announcement and offer distribution purpose. Otherwise, the eligibility to the Offer may be cancelled.
6. AIA is not responsible for verifying the accuracy of the email addresses or mobile numbers submitted by the Qualified Customers. Should there be any misdelivery of notification regarding Offer redemption resulted from inaccurate / incorrect information submitted by the Qualified Customers, AIA will not re-issue the Offer.
7. The campaign will be ended upon meeting quota.
8. The distribution of the Offer does not involve any new policy sales or purchases.
9. The Selected Customers should fulfill the criteria of the Offer to enjoy the Offer. The Selected Customers who are qualified for other promotion(s) but do not fulfill the criteria of the Offer will not be eligible for the Offer.
10. AIA is not the manufacturer/supplier of the e-vouchers and shall have no obligation and liability in any issues that arise from the Offer. Any disputes arising from the Offer shall be resolved between the participants and the manufacturer / supplier directly. The use of the e-voucher is subject to terms and conditions. For details of how to use the e-voucher, please refer to the relevant terms and conditions as set by the manufacturer/supplier.
11. AIA reserves the right to interpret these terms and conditions. For any dispute arising from this campaign, AIA reserves the right of final decision.

Other Points to Note:

1. Financial planners should not use this Offer as the incentive for attracting customers to apply for an insurance plan and should not be used to distract customers from making an informed decision on whether or not to purchase the product. Financial planners must conduct financial needs analysis to assess the customers' needs and affordability before making product recommendation. Customers should decide the premium based on their needs and affordability.
2. This campaign can only be promoted within Hong Kong and Macau territory according to the agent's relevant license. All solicitation activities and insurance application must be conducted in Hong Kong and Macau territory. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants/Policyowner From MCV Business" and MCV related guidelines.
3. Before contacting the policyholder, please check whether the policyholder is on the opt-out list or not. If yes, please do not conduct direct marketing before obtaining explicit consent from customers (including the promotional offer).

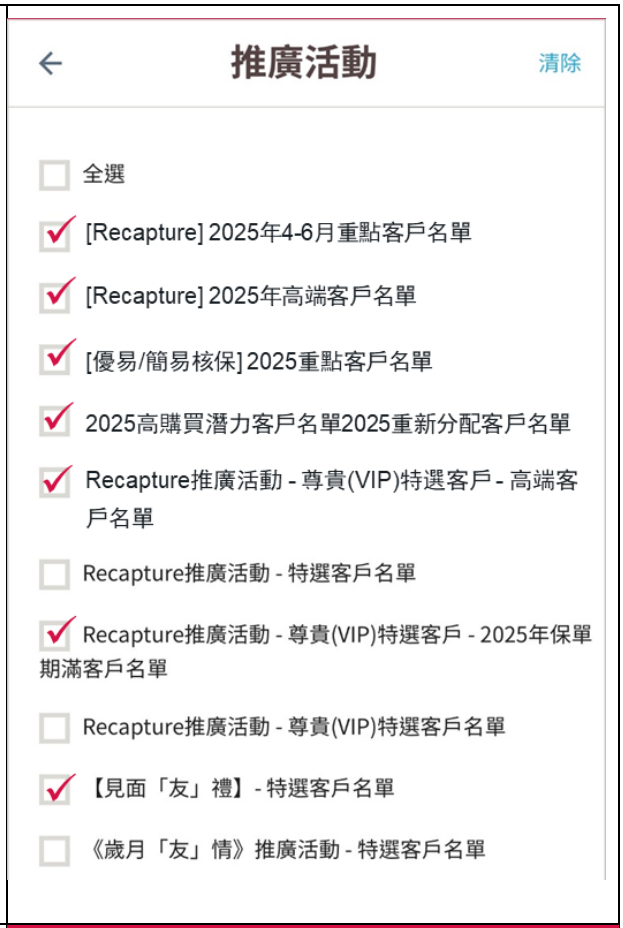
「我們」、「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"We", "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).
只供 AIA 內部使用。/ For AIA Internal Use Only.

[AIA – INTERNAL]

AIA Hong Kong
27/F Hopewell Centre,
183 Queen's Road East,
Hong Kong
T: (852) 2881 3333
AIA.COM.HK

Memo

附錄 2：【見面「友」禮】活動 — 適用客戶名單 [更新]
Appendix 1:【Meet-and-Greet Delights】Campaign – Applicable Customer List [Update]

iEngage > CRM > 進階搜尋 > AIA 保單資料 > 推廣活動 iEngage > CRM > Advanced Search > AIA Policy Information > Campaigns	
iPoS > 推廣活動及銷售機遇 > Recapture iPoS > Leads & Campaigns > Recapture	
AIA Smart > 🎥 > 推廣活動類別 > Recapture AIA Smart > 🎥 > Campaign Type > Recapture	

「我們」、「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"We", "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).
只供 AIA 內部使用。/ For AIA Internal Use Only.

[AIA – INTERNAL]