AIA Hong Kong
Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333
AIA.COM.HK

Memo

Attn	:	All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners	From	:	Amy Chan
Copy	:	Mr. Alger Fung/ Mr. Louie Ho All department Heads / ABDD Executives	Dept	:	Management Team
Date	:	1 April 2025	Total page	:	9
Subject	:	(A250423) **AIA President Club 2026 – Athens, Greece** **AIA 總裁卓越會 2026 – 希臘雅典**			

希臘雅典是古代文明的搖籃，其超卓的思想家之學說對人們的發展至今仍有深遠影響。AIA 總裁卓越會 2026 將於雅典舉行，象徵與會的精英們對公司的貢獻舉足輕重。只要您成為年度精英之最，即可參與這趟旅程，探索古老的歷史之外，這座城市還擁有充滿活力的街區、精緻的美食和多元化的文化景觀。雅典將過去的魅力與現代大都市的活力融為一體，使其成為理想的總裁卓越會之旅目的地。

總裁卓越會特意為 AIA 的頂尖精英而設，屬至高榮譽的嘉許。友邦保險集團的 18 個國家及地區將一同競逐這項殊榮，其中香港及澳門最傑出的 51 位營業單位主管及財務策劃顧問，可成為其尊貴會員並獲邀出席 2026 年總裁卓越會之旅，與各地的頂尖領袖及財務策劃顧問一同分享豐碩成果。

請您把握機會突破自我，登上高峰，爭取總裁卓越會一席位，與友邦集團精英中之精英匯聚一堂！

競賽詳情請參閱下頁。

For details, please refer to the contest information below.

Regards,

Amy Chan
Chief Agency Officer
Agency Distribution
AIA Hong Kong and Macau
AC/AL/CC/KT

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AIA 總裁卓越會 2026

競賽日期:
2025 年 1 月至 12 月 (共 12 個月)

目的地:
希臘雅典 (5 日 4 夜)

競賽規則及獎賞:

- 下列獎項之最高排名得獎者將獲邀出席總裁卓越會 2026 之旅。友邦香港及澳門精英可獲**共 51 席位**。
- 最高排名獎項之競賽組別是根據**香港及澳門區年度大獎**排名，其競賽規則以公司 2025 年會籍及獎賞手冊為準。
- 得獎者最多只能獲得 1 個席位。若得獎者在多於一個組別獲得排名，則以較高名次之獎項為先，若名次相同，即以下列獎項排序為準。原有獎項則由該組別之其後合資格者獲得。

詳情如下:

1) 最高排名獎項 (根據香港及澳門區總年度大獎排名)		
競賽組別	**獲獎名次**	**獎賞**
頂尖傑出區域 (PGDOY) 區域總監 (最高 FYC C&A 增長率)#	首 3 名	• 獲邀出席總裁卓越會 2026 之旅，參與集團安排的活動 • 各個組別之首 1 名得獎者可獲**商務機位** • 其他得獎者獲經濟機位 • 安排入住單人房 (5 日 4 夜)
頂尖傑出區域 (PGDOY) 區域總監 (最高 FYC C&A)#	首 1 名	
超級傑出區域 (SGDOY) 區域總監	首 3 名	
傑出區域 (GDOY) 區域總監	首 2 名	
最佳區域 (DOY) 區域總監	首 1 名	
最傑出區域總監	首 5 名	
最多 MDRT 會員之區域總監	首 1 名	
最傑出資深經理	首 5 名	
最傑出資深分區經理	首 5 名	
最傑出新晉資深分區經理	首 1 名	
最傑出個人業績營業單位主管	首 2 名	
最傑出財務策劃顧問	首 15 名	
最傑出新晉財務策劃顧問	首 2 名	

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2) 團體保險獎項		
競賽組別	**獲獎名次**	**獎賞**
傑出團體保險營業單位主管	首 1 名	• 獲邀出席總裁卓越會 2026 之旅，參與集團安排的活動 • 得獎者獲經濟機位 • 若得獎者之 ANP[1),3),4)]達 120 萬美元或以上，參加 AIA 總裁卓越會 [5)]的來回機票將獲升級至**商務機位** • 安排入住單人房 (5 日 4 夜)
傑出團體保險營業單位主管 - 新生意	首 1 名	
傑出團體保險營業精英	首 1 名	• 獲邀出席總裁卓越會 2026 之旅，參與集團安排的活動 • 得獎者獲經濟機位 • 若得獎者之 ANP[1),3),4)]達 120 萬美元以上，參加 AIA 總裁卓越會 [5)]來回機票將獲升級至**商務機位** • 安排入住單人房 (5 日 4 夜)
傑出團體保險營業精英 - 新生意	首 1 名	
傑出 IVS「 友得揀 」營業精英	首 1 名	• 獲邀出席總裁卓越會 2026 之旅 [5)]，參與集團安排的活動 • 得獎者獲經濟機位 • 若得獎者之 IVS「 友得揀 」首年佣金 (FYC) [6-10)] 達 200,000 美元或以上，參加 AIA 總裁卓越會 [5)] 之來回機票將獲升級至**商務機位** • 安排入住單人房 (5 日 4 夜)

註：會員需繳付香港/澳門及會議目的地有關之機場稅及保安稅。所需之總數及所有額外費用將會於旅程後從會員的公司出糧戶口內扣除；如遇特殊情況，公司或會以其他獎賞作替代。

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一般規則：

1. 最高排名獎項之競賽規則，以公司 **2025 年會籍及獎賞手冊為準**。

   # 頂尖傑出區域 (PGDOY)
   計算會籍及獎賞之首年佣金(FYC C&A)增長率最高排名的首 3 個區域；及
   計算會籍及獎賞之首年佣金(FYC C&A)最高首年佣金的首 1 個區域

2. 團體保險獎項之競賽規則如下:

   傑出團體保險營業單位主管
   - 以團體保險生意額**名列榜首**之**營業單位主管**; 及
   - 直屬營業單位取得最高團體保險 ANP 銷售總額[1,3,4]並達 500,000 美元或以上(當中團體保險新生意 ANP 銷售總額[2-4]須達 250,000 美元或以上) ；及
   - 直屬營業單位取得 10 個或以上全新團體保險個案[3,4] ；及
   - 已登記成為 MDRT 2026 會員

   傑出團體保險營業單位主管 - 新生意
   - 以團體保險新生意額**名列榜首**之**營業單位主管**; 及
   - 直屬營業單位取得最高團體保險新生意 ANP 銷售總額[2-4]並達 250,000 美元或以上；及
   - 已登記成為 MDRT 2026 會員

   傑出團體保險營業精英
   - 以團體保險生意額**名列榜首**之**營業同事**; 及
   - 個人取得最高團體保險 ANP 銷售總額[1,3,4]並達 250,000 美元或以上(當中團體保險新生意 ANP 銷售總額[2-4]須達 125,000 美元或以上) ；及
   - 已登記成為 MDRT 2026 會員

   傑出團體保險營業精英 - 新生意
   - 以團體保險新生意額**名列榜首**之**營業同事**; 及
   - 個人取得最高團體保險新生意 ANP銷售總額[2-4]並達 125,000 美元或以上；及
   - 已登記成為 MDRT 2026 會員

   傑出 IVS「 友得揀 」營業精英
   - 以 IVS「 友得揀 」生意額**名列榜首**之**營業同事**; 及
   - 個人取得最高 IVS「 友得揀 」首年佣金 (FYC) [6-10] 並達 100,000 美元或以上；及
   - 已登記成為 MDRT 2026 會員

   1) 只計算於競賽日期內成功繳付保費之團體保險新生意 ANP 及團體保險續保生意增長 ANP (不包括保險徵費) ，包括度身訂造計劃及套裝計劃 (惟原有保單轉換、僱員自選產品、LAUGHING「自選牙科保障計劃」、澳門摯開心保障計劃及附加額外保障計劃除外) 。
   2) 只計算於競賽日期內成功繳付保費之團體保險新生意 ANP (不包括保險徵費) ，包括度身訂造計劃及套裝計劃 (惟原有保單轉換、僱員自選產品、LAUGHING「自選牙科保障計劃」、澳門摯開心保障計劃及附加額外保障計劃除外) 。
   3) 合資格的團體保險新生意保單必須於競賽日期內獲成功繳付首年保費。
   4) 如果合資格團體保險保單屬共同個案 (即個案由 2 名或以上營業同事共同完成) ，同一保單號碼的個案將獲平均分配給每名營業同事，且個案數目將不會以四捨五入方式計算。如果有關獎項以 ANP 計算，每名營業同事獲計算之 ANP 將按比例分配。擁有同一保單編號的團體保險個案，將被視作同一個案計算。

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5) 每名合資格出席 AIA 總裁卓越會之得獎者只可獲得一個會議席位。如果營業同事因符合多項資格而獲取超過 1 個獎項，該名合資格的 CS Master 獎項得獎者只會根據以下組別排序獲授予其獎項；組別排序如下：傑出團體保險營業單位主管 > 傑出團體保險營業單位主管 – 新生意 > 傑出團體保險營業精英 > 傑出團體保險營業精英 – 新生意 > 傑出個人自選保障方案 (IVS) 營業精英；而該名合資格得獎者所獲的其他獎項將由符合該獎項類別的下一位合資格者獲取。

6) IVS「 友得揀 」 保單只計算

a. 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之全新個人保單或指定保單 (包括：「友心意」醫療保障計劃 2、「友愛護」癌症保障計劃及「意安心升級保障」) ：

- 強積金 / 退休金個人賬戶成員：經現有強積金 / 退休金個人帳戶之財務策劃顧問購買
- 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
- 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) 於投保及簽發保單時應為現有友邦團體保險成員。

b. (只限香港) 在職公務員及政府聘用的非公務員 (包括立法會秘書處及房屋委員會之員工) 及其家屬$^{\Delta}$ (配偶及子女) 以保單持有人或受保人身份經任何財務策劃顧問購買指定 AIA 自願醫保計劃。

$^{\Delta}$「家屬」指有關人員的配偶及未滿 21 歲的未婚子女 (包括父母已離婚 / 依法分居子女、繼子女、領養子女及非婚生子女) 。如果子女是 19 或 20 歲，則必須正在接受全時間教育或全時間職業訓練，或由於身體衰弱或精神欠妥而倚賴有關人員供養。

7) 合資格 IVS「 友得揀 」保單只計算於競賽期內經 iPoS 遞交及獲繕發之保單。

8) 若營業同事於競賽期之前已遞交相關保單 / 相關保單已獲繕發，並於競賽期內撤回投保申請 / 取消相關保單，其後再次投保相同產品計劃，相關 FYC 將不獲計算。

9) 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 FYC 將不獲計算。

10) 若保單由兩位或以上營業同事共同完成，相關 FYC 及保單數目將按比例平均分配，而保單數目不會以四捨五入方式計算。

3. 同一受保人於競賽期內投保同一基本計劃及同一保費繳付年期之所有新保單，將以一張保單計算。
4. 營業同事遞交保單申請予 AIA，應預留充足時間確保有關申請已於截數前由 AIA 及/或已授權之單位收妥。
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. 競賽結果以保單冷靜期後作調整為準。
7. 會議出席資格不得轉讓。財務策劃顧問及營業單位主管必須於會議舉行期間與公司仍持有有效合約，方能出席會議。獎項及嘉許不可轉讓及轉換現金。
8. 競賽結果以保單冷靜期後作調整為準。公司保留追討已發放獎賞之權利。
9. 公司保留隨時修改競賽規則及獎賞之權利, 恕不另行通知。
10. 如有任何異議，以 AIA 最後決定為準。

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AIA President Club 2026

Contest Period:
January to December 2025 (12 months)

Destination:
Athens, Greece (5 Days 4 Nights)

Contest Rules & Awards:

- Top Ranking awardees of below categories will be the winners and invited to the President Club 2026 trip. A total of **51** seats are reserved for AIA Hong Kong and Macau.
- Award category is wholly based on Hong Kong and Macau (company wise) Top Ranking Awards, which the qualifying rules follow Clubs & Awards Manual 2025.
- Winners can only earn 1 seat. If qualifier is ranked in more than 1 category, the qualifier will be awarded with higher ranking qualification. The below list of awards sequence will be followed if the ranking of qualification is the same in 2 or above categories. Their original seats under other awards will be replaced by thereafter awardee in respective category.

Details are as follows:

1) Top Ranking Awards (Based on Hong Kong and Macau Final Annual Awards Ranking)		
Category	**Ranking**	**Entitlement**
District Directors of PGDOY (Top FYC C&A Growth Rate)#	Top 3	• Invited to the President Club 2026 trip and participate in activities arranged by Group Office • Top 1 Qualifier of each category will be awarded with **Business Class ticket** • Other Qualifiers will be awarded with Economic Class ticket • Single Room accommodation (5 Days 4 Nights)
District Directors of PGDOY (Top FYC C&A)#	Top 1	
District Directors of SGDOY	Top 3	
District Directors of GDOY	Top 2	
District Director of DOY	Top 1	
District Directors of the Year	Top 5	
District Director with highest no. of MDRT members in District	Top 1	
Senior Managers of the Year	Top 5	
Senior Unit Managers of the Year	Top 5	
New Senior Unit Manager of the Year	Top 1	
Agency Leaders by Personal Production	Top 2	
Financial Planners of the Year	Top 15	
New Financial Planners of the Year	Top 2	

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2) Corporate Solutions (CS) Awards		
Category	**Ranking**	**Entitlement**
CS Master Leader	Top 1	• Invited to the President Club 2026 trip and participate in activities arranged by Group Office • Awarded with Economic Class ticket • Enjoy flight upgrade to **Business Class** for attending 2026 AIA President Club[5)] if ANP[1),3),4)] production exceeding US$1.2M • Single Room accommodation (5 Days 4 Nights)
CS Master Leader – New Business	Top 1	
CS Master Producer	Top 1	• Invited to the President Club 2026 trip and participate in activities arranged by Group Office • Awarded with Economic Class ticket • Enjoy flight upgrade to **Business Class** for attending 2026 AIA President Club[5)] if ANP[1),3),4)] production exceeding US$1.2M • Single Room accommodation (5 Days 4 Nights)
CS Master Producer – New Business	Top 1	
Individual Voluntary Solutions (IVS) Producer	Top 1	• Invited to the President Club 2026[5)] trip and participate in activities arranged by Group Office • Awarded with Economic Class ticket • Enjoy round-trip air ticket upgrade to **Business class** for attending the AIA President Club[5] if the FYC [6-10] exceeds US$200K • Single Room accommodation (5 Days 4 Nights)

***The expenses of Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination will be borne by qualifiers. The mentioned cost and all extra expenses will be debited from qualifiers' company payroll account after the trip. Please note that AIA reserves the right to offer alternative prize arrangement.**

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General Rules & Regulations:

1. Detailed qualifying rules of Top Ranking Awards will follow **Clubs & Awards Manual 2025**.

   # Premier Grand Districts of the Year
   Top 3 Districts with the highest growth rate in FYC C&A, and
   Top 1 District with the highest FYC C&A

2. Detailed qualifying rules of Corporate Solutions (CS) Awards as below:

   CS Master Leader
   - **The agency leader** who **ranks No. 1** in terms of group insurance business;and
   - Achieve the Highest Group Insurance Business in ANP[1,3,4] by direct agency, with a minimum production of US$500,000 (of which, with a minimum of US$250,000 Group Insurance New Business in ANP[2-4]); and
   - With a minimum of 10 new Group Insurance cases[3,4] from direct agency;and
   - Registered as a 2026 MDRT Member

   CS Master Leader – New Business
   - **The agency leader** who **ranks No. 1** in terms of group insurance new business; and
   - Achieve the Highest Group Insurance New Business in ANP[2-4] by direct agency, with a minimum production of US$250,000; and
   - Registered as a 2026 MDRT Member

   CS Master Producer
   - **The producer** who **ranks No. 1** in terms of group insurance business; and
   - Achieve the Highest Group Insurance Business in ANP[1,3,4] individually, with a minimum production of US$250,000 (of which, with a minimum of US$125,000 Group Insurance New Business in ANP[2-4]); and
   - Registered as a 2026 MDRT Member

   CS Master Producer – New Business
   - **The producer** who **ranks No. 1** in terms of group insurance new business; and
   - Achieve the Highest Group Insurance New Business in ANP[2-4] individually, with a minimum production of US$125,000; and
   - Registered as a 2026 MDRT Member

   Individual Voluntary Solutions (IVS) Producer
   - **The producer** who **ranks No. 1** in terms of IVS business; and
   - Achieve the Highest IVS First Year Commission (FYC)[6-10] individually with a minimum FYC of US$100,000, and
   - Registered as a 2026 MDRT Member

   1) Only the ANP of Group Insurance new business and the ANP growth of Group Insurance renewal business settled within the Contest Period will be counted (excluding premium levy), including tailor-made plans and packaged plans (excluding conversion from existing policies, employee voluntary plans, LAUGHING, CHEERS Macau and top-up plans).
   2) Only the ANP of Group Insurance new business settled within the Contest Period will be counted (excluding premium levy), including tailor-made plans and packaged plans (excluding conversion from existing policies, employee voluntary plans, LAUGHING, CHEERS Macau and top-up plans).
   3) Eligible Group Insurance new business policy(ies) must have the first year's premium successfully settled within the Contest Period.
   4) If the qualified cases are jointly closed by two or more producers, case count will be evenly shared by each producer under the same policy number. Case count calculation will not be rounded-up accordingly. If the reward is

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calculated by ANP, the ANP allocated for each producer will be shared proportionally. Group Insurance Case(s) registered under the same policy number will be counted as one Group Insurance Case.

5) Each awardee who is eligible to attend the AIA President Club will be awarded with **one seat only**. If a producer is qualified for more than one award, the eligible CS Master awardee will be granted the seat according to the following sequence of category: CS Master Leader > CS Master Leader - New Business > CS Master Producer > CS Master Producer - New Business > Top IVS Producer. The seat(s) of other subsequent category(ies) will then be awarded to the next eligible awardee(s) in the respective category.

6) Individual Voluntary Solutions (IVS) policy is qualified only if:
   a. Corporate Solutions members purchase a new personal insurance policy or designated policy (including StepUp Medical Protection Plan 2, Shield Up Cancer Protection Plan and Secure First Plus) as policyholder or insured through the following channels:
      - MPF/pension personal account members: Purchase through the existing financial planner of the MPF/pension personal account.
      - 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.
      - 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.

   b. (For Hong Kong only) Serving civil servants and non-civil servants employed by the Government (including staff members of Legislative Council Secretariat and Housing Authority) and their families$^{\Delta}$ (spouse and children) purchase a specified AIA Voluntary Health Insurance Scheme as policyholder or insured through any financial planner.

      $^{\Delta}$ "Family" means the officer's spouse and children (including children of divorced/legally separated officers, step-children, adopted children and illegitimate children) who are unmarried and under the age of 21. In the case of children aged 19 or 20, they must also be in full time education or in full time vocational training, or dependent on the officer as a result of physical or mental infirmity.

7) Eligible IVS policies will only be counted if they are submitted via iPoS and issued within the Challenge Period.

8) Producers who have submitted policies/policies issued before the Challenge Period and then reapply for the same products with the same insured, the corresponding FYC will NOT be counted.

9) All cases changed/lapsed from existing policies of the same policyholder or insured will NOT be counted.

10) If the policy is jointly completed by two or more producers, the relevant FYC and Policy Count will be evenly shared in proportion while Policy Count will not be rounded-up.

3. Policies under the same insured for the same basic plans and with same premium pay period, which are issued within the contest period will be counted as one case.
4. For case applications submitted to AIA, producers are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorized vendor before the cut-off time.
5. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
6. Cooling-off policies are excluded.
7. All the privilege and awards of related Convention is not transferable and is restricted to Financial Planners or Agency leaders who hold valid contracts with the Company at the time of Convention. The award and recognition are not transferrable and cannot be exchanged for cash.
8. Cooling-off policies are excluded. Company reserves the right to claw back the awarded gift after cooling-off period.
9. AIA reserved the right to amend any of the rules of this contest or offer alternative award subject to availability at any time without prior notice.
10. In the event of dispute, AIA's decision is final and conclusive.

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