AIA Hong Kong
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Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)

From: Angela Yeung

Dept: Customer and Marketing

Copy: Mr. Alger Fung
Ms. Melissa Wong
All Department Heads
Macau CEO / ABDD Executives

Total pages: 7

Date: 15 May 2025

Subject: 250510 快閃 5-6 月之「特選單一保障保單客戶：儲蓄保險計劃限時優惠」推廣活動
May-June Flash – "Selected Single-protection-policy-holding Customers: Savings Insurance Plans Limited Time Offer" Promotion



推廣期	2025 年 **5 月 15 日**至 2025 年 **6 月 30 日**，包括首尾兩天 (「推廣期」)；新保單須於推廣期內申請及遞交(根據申請及遞交日期)。
合資格客戶	詳見以下**特選單一保障保單客戶**名單(「特選客戶」)： • iEngage > CRM > 進階搜尋 > AIA 保單資料 > 推廣活動 > 特選儲蓄計劃限時優惠 - 特選客戶名單 特選客戶須符合以下所有條件： • 只持有 1 張仍生效的 AIA 個人保障保單(包括住院、危疾、人壽及意外)之保單持有人（計算至 2025 年 5 月 6 日），及 • 其最近之保單於 2015 年 5 月 1 日至 2019 年 4 月 30 日期間投保，及 • 其現時年齡為 35 歲 - 64 歲（計算至 2025 年 6 月 30 日）
推廣優惠	特選客戶於推廣期內按需要投保任何下列三款指定計劃(一次性繳付保費期)**金額達 1 萬美元** *，即可享尊屬保費折扣：

指定計劃*	**「盈御多元貨幣計劃 3」(GP3)** (一次性繳付保費期)	**「充裕未來 · 盈尚」(BPV)** (一次性繳付保費期)	**「簡愛• 延續」保障計劃 5 (SLE5)** (一次性繳付保費期)
保費折扣	**4%**	**4%**	**3%**

按此參閱客戶宣傳單張

*新保單須於 2025 年 8 月 31 日或之前繕發。

條款及細則	請見附錄 2 之條款及細則。

推廣期有限，請把握推廣良機！

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

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Selected Single-protection-policy-holding Customers Repurchase to Enjoy up to 4% Premium Discount from Savings Plans



Promotional Period	**15 May** 2025 to **30 Jun** 2025. Both dates inclusive and applicable to both new policy application date and submission date ("Promotion Period").
Eligible Customers	Please refer to the selected single-protection-policy-holding customer list ("Selected Customer"): • iEngage > CRM > Advanced Search > AIA Policy Information > Campaigns > Selected Saving Plans Limited Time Offer - Selected Customer List The selected customers include the existing customer who fulfils all the following requirements: • Existing customers who are holding one AIA individual protection policy only (includes hospitalization, critical illness, life protection and accident policies) and the policy remains in-force (as of 6 May 2025), and • whose last policy purchased during 1 May 2015 to 30 April 2019, and • currently aged 35 – 64 (as of 30 June 2025)
Promotional Offer	Selected customers who apply for any one of the following three Specified Products (one-time premium payment term)* with one-time premium amount **reaching USD10,000** on a need basis during the campaign period can enjoy the exclusive premium discount:

Specified Product*	Global Power Multi-Currency Plan 3 (GP3) (one-time premium payment term)	Bonus Power Vantage (BPV) (one-time premium payment term)	Simply Love Encore 5 (SLE5) (one-time premium payment term)
Premium Discount	**4%**	**4%**	**3%**

Click here for the promotional leaflet

*The new policy must be issued on or before 31 August 2025.

T&C	Terms and Conditions on Appendix 2.

Limited-time offers! Please seize the sales opportunity!
Should you have any queries, please email to Customer and Marketing at AIAHK.CustomerExperience-ECM@aia.com

Best regards,

Angela Yeung
Head of Digital & Design Experience Customer & Marketing

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附錄 1：投保優惠表
Appendix 1: Application Offer Rate Card

投保優惠			
指定推廣產品	**保費繳付期**	**保費金額 (每張保單計)**	**保費折扣**
「盈御多元貨幣計劃 3」	**一次性繳付保費**	美元 / 澳元 / 加元 10,000 或以上 港元 / 澳門幣 75,000 或以上 人民幣 60,000 或以上 英鎊 6,000 或以上 歐元 7,000 或以上 新加坡元 12,000 或以上	4%
「充裕未來 ·盈尚」		美元 10,000 或以上	4%
「簡愛• 延續」保障計劃 5		美元 10,000 或以上 港元/澳門幣 75,000 或以上	3%

Application Offer			
Specified Product	**Premium Payment Term**	**Premium Amount (per policy)**	**Premium Discount**
Global Power Multi-Currency Plan 3	**One-time premium payment**	USD/AUD/CAD 10,000 or above HKD/MOP 75,000 or above RMB 60,000 or above GBP 6,000 or above EUR 7,000 or above SGD 12,000 or above	4%
Bonus Power Vantage		USD 10,000 or above	4%
Simply Love Encore 5		USD 10,000 or above HKD/MOP 75,000 or above	3%

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附錄 2：快閃 5-6 月之「特選單一保障保單客戶：儲蓄保險計劃限時優惠」推廣活動 – 條款及細則

1. 此推廣之通告及宣傳單張只載有一般資料，並不構成任何銷售建議及/或有關產品之推介。於投保保險產品之前，客戶須完成財務需要分析，並根據實際保障需要和負擔能力投保。所有此推廣之通告及宣傳單張中的產品資料只供參考，並不包含保單的完整條款。有關產品特點、條款及細則、不保事項及主要產品風險之詳情，請參閱相關產品之產品簡介及保單契約。如欲在投保前參閱保險合約之樣本，您可向AIA 索取。人壽保險保單屬長期的保險合約。如於早年退保，您所收取的金額可能大幅少於已繳的保費。
2. 此推廣並不適用於在相關推廣期之前已遞交或已繕發但其後於相關推廣期內撤回投保申請或取消保單，並再次投保相同保險產品之客戶。
3. 此推廣並不適用於由其他保險產品轉換計劃至推廣保險產品之基本計劃或附加契約(如適用)。
4. AIA 有權隨時更改本推廣活動的條款及細則而無須另行通知。各推廣優惠均只在推廣保險產品可以接受投保申請時有效。如對本推廣活動有任何爭議，AIA 保留最終決定權。
5. 此推廣之通告及宣傳單張只在香港及澳門(「地區」)發放。
6. **推廣獎賞 - 保費折扣**
   a) 推廣期為2025年5月15日至2025年6月30日，包括首尾兩天（「推廣期」），而該新保單必須於推廣期內申請及遞交（根據申請及遞交日期）。
   b) 特選單一**保障**保單客戶，於推廣期內成功申請及遞交並成功於2025年8月31日或之前繕發之指定推廣產品新保單 (「新保單」)，可享保費折扣。
   c) 指定推廣產品指「盈御多元貨幣計劃3」(一次性保費繳付期)、「充裕未來·盈尚」(一次性保費繳付期)及「簡愛·延續」保障計劃5 (一次性保費繳付期)。
   d) 如新保單符合上述資格，客戶將可因應於保單繕發時所繳付之保費金額及保費繳付期而即時享有高達4% 之一次性繳付保費的保費折扣（「保費折扣」），詳見附錄 1：投保優惠表。
   e) 保費折扣之計算只適用於指定推廣產品之標準保費及因核保而需附加之額外保費（如有）。推廣產品以外之其他基本計劃之保費，均不會被納入於計算推廣優惠之內。
   f) 每張合資格之新保單於推廣期內只可獲取此推廣一次。如新保單符合多於一項推廣優惠之要求，客戶可獲取保費折扣金額較高的推廣優惠。
   g) 保單資料頁(只適用於一次性保費繳付期)：有關保費折扣之金額將載於保單資料頁。

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其他注意事項：

1. 財務策劃顧問須提醒客戶人壽保險保單屬長期的保險合約，其設計及宗旨為保障人的壽命，通常涉及較長年期。客戶應根據自身的保障需要和保費負擔能力投保適合的保險產品。
2. 財務策劃顧問不應以推廣優惠作客戶投保之誘因，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。
3. 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。
4. 財務策劃顧問必須遵守"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。
5. 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) 。
6. 財務策劃顧問必須根據客戶實際需要而建議合適產品。如該產品及/或地區屬於須要完成財務需要分析，財務策劃顧問必須於進行產品推介或銷售前與客戶完成相關之財務需要分析。
7. 財務策劃顧問必須清楚理解產品特色，並在客戶查詢時提供正確之產品資訊，及與產品相關連的風險及主要不受保事項等。

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Appendix 2: Terms and Conditions of May-June Flash - "Selected Single-policy-holding Customers: Savings Plans Limited Time Offer" Promotion

1. The promotional memo and leaflet contain general information only. It does not constitute as an offer and/or insurance product recommendation. Customer must complete the Financial Needs Analysis before applying for any insurance product, and customers should apply based on their protection needs and affordability. The product information in the promotional memo and leaflet are for reference only, which does not contain the full terms of the product. For details of the product features, terms and conditions, exclusions and key product risks, you may refer to the relevant product brochure and policy contract of relevant products. In case you want to read policy contract sample before making an application, you can obtain a copy from AIA. Life insurance policies are long-term contracts of insurance. Should you surrender the policy early, you may receive an amount considerably less than the total amount of premiums paid.
2. This promotion is not applicable to the applicants who have submitted the applications before the relevant Promotional Period but withdrew the applications or cancelled the policies issued during the relevant Promotional Period which re-apply for the same products.
3. This promotion is not applicable to plan change cases (basic plans or riders, if applicable) from other insurance plans to the insurance plans in this promotion.
4. AIA reserves the right to change any terms and conditions of this promotion without advance notices. All Promotional Offers are valid only when the promoted insurance products are available for application. In the event of any disputes, AIA's decision shall be final and conclusive.
5. The promotional memo and leaflet are for distribution in Hong Kong and Macau ("Territories") only.
6. **Promotional Offer: Premium Discount**
   a. The promotional period is from 15 May 2025 to 30 June 2025, both dates inclusive ("Promotional Period"), and the new policy must be applied and submitted within the Promotional Period (based on application date and submission date).
   b. The selected single-protection-policy-holding customers who apply and submit a new policy ("New Policy") of Specified Product during the Promotional Period and must be issued on or before 31 August 2025 will enjoy premium discount offer.
   c. Specified Products are Global Power Multi-Currency Plan 3 (one-time premium payment term), Bonus Power Vantage (one-time premium payment term), and Simply Love Encore 5 (one-time premium payment term).
   d. If the New Policy is qualified, customers will be entitled to the upfront premium discount (the "Discount") up to 4% of one-time premium payment in accordance with the premium payment term and premium amount paid under the New Policy. For details, please refer to Appendix 1: Application Offer Rate Card.
   e. The calculation of the Discount is only applicable to the standard premium and extra premium due to underwriting (if any) of Specified Products. Apart from the Specified Products, the premiums of all other basic plan(s) will not be applied for calculating the premium discount amount.
   f. Each qualified New Policy can only enjoy this promotion once during the Promotional Period. If the New Policy fulfils more than one promotional offer's requirement, the promotional offer with higher premium discount amount will be entitled.
   g. Policy Information Page (only applicable to one-time premium payment term): The amount of premium discount will be stated on the policy information page.

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Other Points to Note:

1. Financial planners should remind customers that life insurance policies are long-term contracts of insurance, designed and intended to be in force over multiple years of a person's life. Customers should apply suitable insurance products based on their own protection needs and affordability.
2. Financial planners should not use promotion offers 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.
3. 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.
4. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants / Policyowner from MCV Business" and MCV related guidelines.
5. 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 activities).
6. Financial Planners must recommend product to customers based on the customer's actual need. If the product concerned and/or Territory requires the completion of Financial Needs Analysis, Financial Planners must complete such analysis with customers before product recommendation / solicitation.
7. Financial Planners must familiarize with the product features, and explain clearly the key product features, risks and exclusions to customers upon receipt of customers' enquiries.

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