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健康長久好生活

Memo

Attn	:	All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners (Hong Kong and Macau)	From	:	Amy Chan
Co/Dept	:	Mr. Alger Fung/ Mr. Louie Ho/ All Department Heads/ ABDD Executives	Dept	:	Management Team
Date	:	3 July 2025	Total page	:	23 + Appendix
Subject	:	**(A250730) (更新) 2025 CEO Club - 燃亮自己 延續守護** **(Update) 2025 CEO Club – Ignite youself, never cease to protect**			

今年第三季是 CEO Club 隆重登場的日子，我們以「**燃亮自己　延續守護**」為主題，推出一系列競賽，協助營業同事燃亮內心的熱誠與專業，超越極限，不僅照亮自己的成長之路，CEO CLUB 的慈善元素更會延續守護至社會上有需要的人。今年的受惠機構是以「匡扶智障」為使命，致力於服務本地智障人士及其家庭的**匡智會**。

CEO CLUB 是菁英薈萃的崇高會藉，代表著尊貴及榮耀，完成指定業績要求，即有機會獲邀出席**「瑞士極境登峰之旅」**到訪歐洲之巔或參與 AIA 年終經典大型活動！
而憑藉各位的卓越表現，**友邦香港 MDRT 會員榮獲四項全球第一的佳績！**為表揚同事的努力與成就，公司特別於 8-9 月份加推**「MDRT 全球 No. 1 現金獎賞」**，以進一步激勵大家持續追求卓越表現。

在7至9月，讓我們以行動燃點信念，以成果延續對每位客戶、甚至受惠對象的守護，在年終結算前超越極限，爬上頂峰 ！

Beyond No. 1 客戶為先 卓越領先

有關競賽詳情請參閱下文。
For details, please refer to the contest information below.



Amy Chan
Chief Agency Officer
Agency Distribution
Hong Kong and Macau
AC/AL/CC/CL/AY

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2025 CEO Club - 燃亮自己 延續守護——競賽概覽

競賽資格

所有財務策劃顧問及營業單位主管

競賽概覽

競賽名稱	競賽日期	級別基本要求	獎賞
AIA年終經典大型活動限時挑戰賽	2025年8月 (1個月)	HK$20,000 (FYC Benefit)	AIA年終大型活動門票2張
		HK$40,000 (FYC Benefit)	AIA年終大型活動門票4張
		達成上述FYC Benefit的新晉財務策劃顧問	額外AIA年終大型活動門票1張
MDRT全球No. 1現金賞	2025年8月至9月 (2個月)	HK$200,000 (FYC Benefit)	現金獎賞 HK$4,888
		HK$375,000 (FYC Benefit)	現金獎賞 HK$11,110
瑞士極境登峰之旅	2025年7月至9月 (3個月)	HK$1,200,000 (FYC Benefit)	獲邀出席「瑞士極境登峰之旅」及於慶祝晚宴特別嘉許 (如適用)
活躍同行 - 個人級別		達成活躍營業代理	每1個月公司代表捐贈HK$10/50
		首160名最高捐款額排名的3個月活躍之2025卓越顧問	獲邀出席AIA專屬義工活動
活躍同行 – 區域嘉許挑戰賽		各區域級別最高捐款額之區域	以區域名義贊助匡智會設施

備註：

- 於競賽期內獲繕發之**綜合醫療保健策略(IHS)** 及 **IVS「友得揀」**之FYC可獲**1.5倍**特別計算於業績內；而競賽期內獲繕發之**「藍十字」佣金**更獲**2倍**的特別計算於業績內！
- 以個人業績達標之以下競賽獎賞不可同時兼得，以較高獎賞級別為準 (以下由高至低排列)：
  - 瑞士極境登峰之旅
  - MDRT 全球 No. 1 現金賞 (級別 2)
  - MDRT 全球 No. 1 現金賞 (級別 1)
- 有關各競賽詳情，請參閱下文。

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(重新推出) AIA年終經典大型活動限時挑戰賽

競賽資格

所有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8月 (1個月)

競賽規則及獎項

於競賽期內完成以下業績要求，即可獲相應數目之**AIA年終大型活動門票**，成功達標的新晉財務策劃顧問# 更可獲**額外1張相關門票。**

競賽期內獲繕發之**綜合醫療保健策略(IHS)**[1] 及 **IVS「友得揀」**[2] 之FYC更可獲**1.5倍**的特別計算+於業績內；

而競賽期內獲繕發之**「藍十字」佣金**[3,4,5]更獲**2倍**的特別計算+於業績內。

級別^	計算福利之首年佣金 (FYC Benefit) 要求(包含特別計算+)	AIA 年終大型活動門票
級別 1	HK$20,000 [經特別計算+後，實際達標 FYC Benefit 可低至 HK$18,000]	2 張
級別 2	HK$40,000 [經特別計算+後，實際達標 FYC Benefit 可低至 HK$36,000]	4 張

備註：

- #新晉財務策劃顧問只適用於 2024 年 1 月或之後合約生效之財務策劃顧問、財務策劃實習生合約者、Industry LOU Package 的新晉財務策劃顧問（包括但不限於 STAR/ SUPER BANK/ BANK LOU 並以公司的最新規定為準）、重新加入 AIA 的財務策劃顧問，但不包括新晉營業單位主管及於競賽期內晉升之營業單位主管。
- +於競賽期內獲繕發**綜合醫療保健策略 (IHS) 及 IVS「友得揀」**之 FYC 可獲 **1.5 倍**計算於業績內；於競賽期內獲繕發**「藍十字」佣金**可獲 **2 倍**計算於業績內。額外特別計算之金額各以各級別的 FYC Benefit 要求之 **5%**為上限。
  - 類別 I：綜合醫療保健策略 (IHS) 及 IVS「友得揀」FYC：級別 1 之額外特別計算上限 (不包含本身之實際 FYC 部分) 為 **HK$1,000**，級別 2 則為 **HK$2,000**。如該保單產品均為綜合醫療保健策略 (IHS) 及 IVS「友得揀」，只限一次 1.5 倍計算於業績內。
  - 類別 II：「藍十字」佣金：級別 1 之額外特別計算上限為 **HK$1,000**，級別 2 則為 **HK$2,000**。
- ^級別 1 至 2 之獎賞不可同時兼得，以較高者為準。每位營業同事可獲之 AIA 年終大型活動門票上限為 5 張。

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例子

財務策劃顧問入職日期	[A] 實際 FYC Benefit (HK$) [僅包含 IHS 及 IVS 未獲特別計算之 FYC，不包含「藍十字」佣金]	[B] 競賽期內完成之 IHS 及 IVS FYC (HK$)	[C] 競賽期內完成之「藍十字」佣金 (HK$)	[A] + [B]*0.5+[C]*2 包含特別計算之 FYC Benefit (HK$)	達標級別	獎賞
2023 年 1 月	19,000	1,600	200	20,200 [19,000 + 1,600*0.5+200*2]	級別 1	AIA 年終大型活動門票 2 張
2025 年 1 月	37,000	5,000	1,000	41,000 [37,000 + **2,000** + 1,000*2] ***級別 2 之綜合醫療保健策略及 IVS「友得揀」FYC 上限為 2,000**	級別 2	AIA 年終大型活動門票 5 張

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MDRT 全球 No.1 現金賞

競賽資格

所有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8月至9月 (2個月)

競賽規則及獎項

於競賽期內達到**2個月#活躍[6]**，並完成以下業績要求，即可獲得高達HK$11,110的現金獎賞！

競賽期內獲繕發之**綜合醫療保健策略(IHS)[1]** 及 **IVS「友得揀」[2]**之FYC可獲**1.5倍**的特別計算+於業績內；

而競賽期內獲繕發之**「藍十字」佣金[3,4,5]**更獲**2倍**的特別計算+於業績內。

級別^	競賽要求		現金獎賞
	活躍 [6] 月份	計算福利之首年佣金 (FYC Benefit) 要求 (包含特別計算+)	
級別 1	2 個月#	HK$200,000 [經特別計算+後，實際達標 FYC Benefit 可低至 HK$180,000]	HK$4,888
級別 2		HK$375,000 [經特別計算+後，實際達標 FYC Benefit 可低至 HK$337,500]	HK$11,110

備註：

- +於競賽期內獲繕發**綜合醫療保健策略 (IHS) 及 IVS「友得揀」**之 FYC 可獲 **1.5 倍**計算於業績內；於競賽期內獲繕發**「藍十字」佣金**可獲 **2 倍**計算於業績內。額外特別計算之金額各以各級別的 FYC Benefit 要求之 **5%**為上限。
  - 類別 I：綜合醫療保健策略 (IHS) 及 IVS「友得揀」FYC：級別 1 之額外特別計算上限 (不包含本身之實際 FYC 部分) 為 **HK$10,000**，級別 2 則為 **HK$18,750**。如該保單產品均為綜合醫療保健策略 (IHS) 及 IVS「友得揀」，只限一次 1.5 倍計算於業績內。
  - 類別 II：「藍十字」佣金：級別 1 之額外特別計算上限為 **HK$10,000**，級別 2 則為 **HK$18,750**。
- #如財務策劃顧問於 2025 年 9 月 1 日或之後入職，只需於與 AIA 持有效合約之月份成為活躍營業代理即可完成活躍營業代理之要求。
- ^瑞士極境登峰之旅及 MDRT 全球 No.1 現金賞之級別 1、級別 2 獎賞不可同時兼得，以較高者為準。

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瑞士極境登峰之旅

競賽資格

所有財務策劃顧問及營業單位主管

競賽日期

2025年7月至9月 (3個月)

1) 基本競賽要求及獎項：於競賽期內完成指定要求，將獲邀出席**「瑞士極境登峰之旅」**。

- **第一部分：以個人業績計算**

獎賞(1)：於競賽期內達到**HK$1,200,000**計算福利之首年佣金 (FYC Benefit，包含特別計算⁺)，將獲邀出席**「瑞士極境登峰之旅」**。

競賽期內獲繕發之**綜合醫療保健策略(IHS)**[1] 及 **IVS「友得揀」**[2] 之FYC更可獲**1.5倍**的特別計算⁺於業績內；而7月至9月內獲繕發之**「藍十字」佣金**[3,4,5]更獲**2倍**的特別計算⁺於業績內！

[經特別計算⁺後，實際達標FYC Benefit可低至**HK$900,000**]

獎賞(2)：慶祝晚宴特別嘉許排名賽

完成基本競賽要求而獲邀出席**「瑞士極境登峰之旅」**之得獎者可競逐嘉許排名賽，**首10名**財務策劃顧問以實際計算福利之首年佣金 (FYC Benefit)可獲邀嘉許。

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- **第二部分：區域/營業組別業績及慶祝晚宴特別嘉許排名賽**

於競賽期內達到以下排名要求之得獎者，將獲邀出席**「瑞士極境登峰之旅」**，**頂尖傑出區域 (PGDOY)之區域總監更獲特別豁免排名要求，只需達到競賽之最低要求**，即可獲邀出席**「瑞士極境登峰之旅」**！

而完成基本競賽要求而獲邀出席**「瑞士極境登峰之旅」**之得獎者更可競逐嘉許排名賽，以實際計算福利之首年佣金 (FYC Benefit)達到指定排名可獲邀嘉許。

競賽組別		競賽要求 – 以相應競賽組別作排名					
		計算業績	獎賞(1)：獲邀出席「瑞士極境登峰之旅」				獎賞(2)：慶祝晚宴特別嘉許排名賽 (以實際 FYCB 計算)
			實際計算福利之首年佣金 (FYC Benefit) 最低要求	實際計算福利之首年佣金 (FYC Benefit) 較去年同期之增長率 最低要求	競賽要求	排名	
(1)	頂尖傑出區域 (PGDOY)[7]	區域業績	HK$1,500,000	+25%增長	實際計算福利之首年佣金 (FYC Benefit) 較去年同期之增長率	名額不限	首 3 名
(2)	超級傑出區域 (SGDOY)[7]					首 3 名	首 3 名
(3)	傑出區域 (GDOY)[7]					首 2 名	首 2 名
(4)	最佳區域 (DOY)[7]					首 1 名	首 1 名
(5)	營業單位主管#	營業組別業績		不適用	實際計算福利之首年佣金 (FYC Benefit)	首 20 名	首 5 名

2) 商務艙升級特別排名賽

完成上述 1) 基本競賽要求之營業同事可競逐以下特別排名賽：

競賽組別		競賽要求 - 以實際計算福利之首年佣金 (FYC Benefit) 作排名	獎賞
(1)	區域級別[7]	首 1 名（區域業績）	來回團體機票升級至商務客位
(2)	營業單位主管#	首 1 名（營業組別業績）	
(3)	財務策劃顧問	首 1 名（個人業績）	

備註：

- [+]於競賽期內獲繕發**綜合醫療保健策略 (IHS) 及 IVS「友得揀」**之 FYC 可獲 **1.5 倍**計算於業績內，額外特別計算之金額 (不包含本身之實際 FYC 部分) 以 **HK$60,000** 為上限。如保單產品均為綜合醫療保健策略 (IHS) 及 IVS「友得揀」，只限一次 1.5 倍計算於業績內。

  於競賽期內獲繕發**「藍十字」佣金**可獲 **2 倍**計算於業績內，額外特別計算之金額以 **HK$240,000** 為上限。

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- 營業同事最多只能於基本競賽獲獎一次：
  - 若得獎者同時於以「個人業績」及「區域/營業組別業績」達標及獲得排名，則以區域/營業單位業績排名賽獲獎為先。
  - 若得獎者同時於以「區域業績」及「營業組別業績」獲得排名，則以較高排名之類別為先；如排名相同或區域為頂尖傑出區域，則以區域業績獲獎為先，於其他類別之排名及獎項則由該類別其後順位排名的參賽者補上。
- #所有營業單位主管截至 2025 年 9 月 30 日其直屬管轄的財務策劃顧問必須最少有 6 名（財務策劃實習生除外），即 1 名主管+6 名財務策劃顧問（「1+6」）。
- 營業同事最多只能於「商務艙升級特別排名賽」獲獎一次：若得獎者同時於以上類別獲得排名，以上列表格類別排序獲獎，於較後類別之排名及獎項則由該類別其後順位排名的參賽者補上。
- 營業同事最多只能於「慶祝晚宴特別嘉許排名賽」獲獎一次：若得獎者同時於以上類別獲得排名，則以較高排名之類別為先，於較後類別之排名及獎項則由該類別其後順位排名的參賽者補上。
- 營業同事需繳付香港/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營業同事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。
- 「區域/營業組別業績排名賽」、「商務艙升級特別排名賽」及「慶祝晚宴特別嘉許排名賽」將不接受上訴申請。
- 瑞士極境登峰之旅及 MDRT 全球 No.1 現金賞之級別 1、級別 2 獎賞不可同時兼得，以較高者為準。

例子

財務策劃顧問入職日期	8-9 月之活躍月份	[A] 實際 FYC Benefit (HK$) [僅包含 IHS 及 IVS 未獲特別計算之 FYC，不包含「藍十字」佣金]	[B] 競賽期內完成之 IHS 及 IVS FYC (HK$)	[C] 競賽期內完成之「藍十字」佣金 (HK$)	[A] + [B]*0.5+[C]*2 包含特別計算之 FYC Benefit (HK$)	達標級別
2023 年 1 月	2	1,100,000	90,000	55,000	1,255,000 [1,100,000 + 90,000*0.5 + 55,000*2]	瑞士極境登峰之旅
2023 年 1 月	1	1,100,000	100,000	130,000	1,390,000 [1,100,000+100,000*0.5 + **240,000**] ***對應級別之「藍十字」佣金特別計算上限為 240,000**	瑞士極境登峰之旅
2025 年 9 月	1	350,000	40,000	8,000	384,750 [350,000 + **18,750** + 8,000*2] ***對應級別之綜合醫療保健策略(IHS)及 IVS「友得揀」FYC 上限為 18,750**	MDRT 全球 No.1 現金賞 - 級別 2

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活躍同行 – 個人級別

競賽資格

所有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7月至9月 (3個月)

競賽規則及獎項

營業同事只要於競賽期內成為**活躍營業代理**[6]，公司即代表營業同事向慈善團體匡智會捐款；如活躍營業代理於2025年9月或之前成為2025卓越顧問#，公司捐款額更會增加5倍，幫助有需要的人。

於競賽期內每月均符合活躍要求[6]並達到指定計算福利之首年佣金 (FYC Benefit)排名之2025卓越顧問#，更可獲邀出席匡智會的AIA專屬義工體驗活動，身體力行回饋社會。

競賽要求	公司捐款/活動體驗
達成活躍營業代理[6]	每1個月每位活躍營業代理[6]捐贈HK$10
達成活躍之2025卓越顧問[6#]	每1個月每位活躍[6]之2025卓越顧問#捐贈HK$50
1) 達成3個月活躍營業代理[6] ；及 2) 於2025年9月或之前成為2025卓越顧問#；及 3) **首160名**達最高捐款額^的卓越顧問	獲邀出席AIA專屬義工活動

備註：

- #有關 2025 年卓越顧問要求，請參閱通告 A250145。
- ^如累計最高捐款額出現相同情況，將以競賽期內之總 FYCB 再作排名。

匡智會 Hong Chi Association
Anniversary 築夢·同行60載

匡智會本著「匡扶智障」的精神，竭誠為智障人士及他們的家庭提供優質教育、適切的培訓及其他賦權的機會，使其得以發展。

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活躍同行 - 區域嘉許挑戰賽

競賽資格

所有區域總監 (以區域業績計算)

競賽日期

2025年7月至9月 (3個月)

競賽規則及獎項

於「活躍同行 – 個人競賽」部分，只要營業代理符合公司捐款資格，**累計最高捐款額之區域**即可獲以下獎賞：

競賽組別	競賽要求	獎賞
頂尖傑出區域 (PGDOY)[7]	**累計最高捐款額之區域 (每組別各一名)** (每 1 個月每位活躍營業代理[6]捐贈 HK$10 每 1 個月每位活躍[6]之 2025 卓越顧問#捐贈 HK$50)	以區域名義贊助匡智會設施
超級傑出區域 (SGDOY)[7]		
傑出區域 (GDOY)[7]		
最佳區域 (DOY)[7]		

備註：

- 如累計最高捐款額出現相同情況，將以競賽期內之區域總 FYCB 再作排名。

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註解：

1. 有關綜合醫療保健策略 (IHS) 名單，請參閱附件。
2. IVS「友得揀」保單只計算：
   (1) 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、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。

   (2) 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*（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。

   *「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。
3. 一般保險業務包括所有經藍十字（亞太）保險有限公司（「藍十字」）繕發的一般保險保單，涵蓋旅遊保險、個人保險及商業保險。
4. 一般保險業務包括於競賽期內遞交（包括首尾兩天）並必須經藍十字核實及須於競賽期完結日當日或之前入賬。
5. 藍十字佣金以扣除銷售折扣後的實收佣金計算。
6. 活躍營業代理是指當月內獲成功繕發/生效最少 1 張人壽保單、或 1 張獨立個人意外保險保單、或 1 張團體保險業務保單、或 1 張退休金企業業務保單、或 3 張退休金個人業務保單。
7. 區域資格及類別以 2025 年度大獎區域為準——只適用於 2025 年 1 月 1 日或之前獲委任的區域總監，並擁有上一銷售年度整年業績紀錄方符合資格，不包括本年度新加入的區域。有關 2025 年度大獎區域類別，請查閱於 2025 年 4 月所發出的相關電郵。

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一般規則：

1. 所有人壽保險、意外及醫療附加契約、意外及醫療獨立保單、人身意外保險、團體保險業務、退休金企業業務及退休金個人業務均計算於FYC Benefit之內。
2. 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，其保單將不獲計算。
3. 所有由現有保單轉換/退保後同一受保人之保單將不獲計算。
4. 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。
5. 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。
6. 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。
7. 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。
8. 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。
9. 所有獎賞不可退換或轉換成以現金發放，安排均以 AIA 最終安排為準。
10. 若保單生效期 24 個月內出現之斷供或保費減額超過或等於競賽期內人壽及個人意外保險首年佣金（FYC）之百份之十五，公司有權根據調整後的 FYC 重新計算相關的花紅金額，以 AIA 最後決定為準。
    無論營業同事當時仍否與 AIA 持有效合約，若調整前後的花紅金額存在差異，公司將扣除相關花紅差額。
11. 無論是免費或從公司購買的公司內部門票，均不能以任何形式轉售他人，亦不得以活動門票作為招徠以營銷保單，包括但不限於：
    - 在保險產品的營銷、推廣或分銷過程中為客戶或潛在客戶送贈禮品，作為誘使/答謝客戶或潛在客戶投購保險產品（保險業監管局 - 指引 25《送贈禮品指引》）；及
    - 未經公司批准或同意，向任何人士轉售活動門票以獲取利益；及
    - 無論能否獲取任何得益或回報，未經公司批准或同意，以任何形式 (包括於社群媒體以抽獎、競賽、遊戲方式)向客戶或潛在客戶送出活動門票。

    詳情請參閱通告A250463。
12. 所有獲獎者必須於獎賞發放時仍與AIA持有效合約。
13. AIA保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
14. 如有任何異議，以AIA最後決定為準。

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2025 CEO Club - Ignite youself, never cease to protect—Contest Overview

Eligibility
All Financial Planners and Agency Leaders

Contest Overview

Contest Name	Contest Period	Requirement	Reward
AIA Year-end Large Scale Grand Classic: Limited time challenge	August 2025 (1 month)	HK$20,000 (FYC Benefit)	2 tickets to AIA year-end large scale event
		HK$40,000 (FYC Benefit)	4 tickets to AIA year-end large scale event
		New Financial Planners who completed the above FYC Benefit	1 additional ticket to AIA year-end large scale event
MDRT Global No.1 Cash Award	August – September 2025 (2 months)	HK$200,000 (FYC Benefit)	Cash Award HK$4,888
		HK$375,000 (FYC Benefit)	Cash Award HK$11,110
Exquisite Journey to Switzerland	July – September 2025 (3 months)	HK$1,200,000 (FYC Benefit)	Being invited to "Exquisite Journey to Switzerland" & Special recognition at gala dinner (if applicable)
Active Together in Action – Personal Level		Achieved Active Producer	Company donation of HK$10/50 for each active month
		Top 160 ranked by donation amount for 2025 Premier Advisor achieved 3-month active	Being invited to AIA-Exclusive Voluntary activity
Active Together in Action – District Recognition Challenge		District with the highest accumulated donation amount (Top 1 for each category)	Sponsoring Hong Chi Association's facilities under the name of the district

Remarks:

- FYC of **Integrated Healthcare Strategy (IHS) Product** and **Individual Voluntary Solution (IVS)** being delivered within contest period will be 1.5 times special counted; **Blue Cross commission** being delivered within contest period will be 2 times special counted.
- Awards for the following contests by personal production are mutually exclusive, according to whichever is higher listed below (from highest to lowest):
  - Exquisite Journey to Switzerland
  - MDRT Global No.1 Cash Award (Level 2)
  - MDRT Global No.1 Cash Award (Level 1)
- Please refer to the following pages for contest details.

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健康長久好生活

Memo

(Re-launch) AIA Year-end Large Scale Grand Classic: Limited time challenge

Eligibility
All financial planners and agency leaders (by personal production)
Contest Period
August 2025 (1 month)

Contest Rules & Awards
Producers who achieved designated FYC Benefit requirement within the contest period will be awarded with respective tickets to **AIA year-end large scale event** . New financial planners[#] who qualified will be awarded with **1 extra ticket**.

FYC of **Integrated Healthcare Strategy (IHS)** [1] **Product** and **Individual Voluntary Solution (IVS)** [2] being delivered within the contest period will be **1.5 times** special counted[+]; **Blue Cross commission** [3,4,5] being delivered within the contest period will be **2 times** special counted[+].

Level[^]	FYC Benefit Requirement (Including special count [+])	Tickets to AIA year-end large scale event
Level 1	HK$20,000 [Actual FYC Benefit requirement can be HK$18,000 after special count[+]]	2
Level 2	HK$40,000 [Actual FYC Benefit requirement can be HK$36,000 after special count[+]]	4

Remarks:

- [#]Only financial planners contracted on or after January 2024 (including new financial planners with Industry LOU Package (including, but not limited to, STAR PLUS, BANK LOU and subject to the latest definition by the Company), those with internship contract and rejoined financial planners) are counted as New financial planners. New Agency Leaders and New Agency Leaders promoted during the contest period are excluded.
- [+]**1.5 times special count** will be applied to FYC of **Integrated Healthcare Strategy (IHS) Product** and **Individual Voluntary Solution (IVS)** being delivered within the contest period;
  2 times special count will be applied to **Blue Cross commission** being delivered within the contest period.
  Special count amount will be capped at **5% of FYC Benefit requirement** .
  - Type I: FYC of Integrated Health Strategy (IHS) Product and Individual Voluntary Solution (IVS):
  Special count amount (not included actual FYC part) is capped at **HK$1,000** for Level 1 and **HK$2,000** for Level 2. If the policy belongs to both Integrated Healthcare Strategy (IHS) Product and Individual Voluntary Solution (IVS), 1.5 times special count can only apply once to the production.
  - Type 2: Blue Cross commission: Special count amount is capped at **HK$1,000** for Level 1 and **HK$2,000** for Level 2.
- [^]Rewards of Level 1-2 are mutually exclusive, according to whichever is higher. Each producer's reward is capped at 5 tickets.

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Example

Contract date	[A] Actual FYC Benefit (HK$) [Included IHS & IVS FYC before special count only, not included Blue Cross commission]	[B] IHS & IVS FYC achieved (HK$)	[C] Blue Cross commission achieved (HK$)	[A] + [B]*0.5+[C]*2 FYC Benefit included special count (HK$)	Achieved level	Reward
Jan 2023	19,000	1,600	200	20,200 [19,000 + 1,600*0.5+200*2]	Level 1	2 tickets to AIA year-end large scale event
Jan 2025	37,000	5,000	1,000	41,000 [37,000 + **2,000** + 1,000*2] ***Special count amount of IHS & IVS FYC is capped at 2,000 for Level 2**	Level 2	5 tickets to AIA year-end large scale event

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MDRT Global No.1 Cash Award

Eligibility
All financial planners and agency leaders (by personal production)

Contest Period
August - September 2025 (2 months)

Contest Rules & Awards
Producers who achieved **2 months# of active**[6] and designated **FYC Benefit** requirement within the contest period, will be awarded with respective cash reward.
FYC of **Integrated Health Strategy (IHS)** [1] **Product** and **Individual Voluntary Solution (IVS)** [2] being delivered within the contest period will be **1.5 times** special counted+; **Blue Cross commission** [3, 4, 5] being delivered within the contest period will be **2 times** special counted+.

Level^	Requirement		Cash Award
	Active[6] Months	FYC Benefit Requirement (Including special count +)	
Level 1	2 months#	HK$200,000 [Actual FYC Benefit requirement can be HK$180,000 after special count]	HK$4,888
Level 2		HK$375,000 [Actual FYC Benefit requirement can be HK$337,500 after special count]	HK$11,110

Remarks:

- +**1.5 times special count** will be applied to FYC Benefit of **Integrated Healthcare Strategy (IHS) Product** and **Individual Voluntary Solution (IVS)** being delivered within the contest period;
  2 times special count will be applied to **Blue Cross commission** being delivered within the contest period.
  Special count amount will be capped at **5% of FYC Benefit requirement** .
  - Type I: FYC of Integrated Health Strategy (IHS) Product and Individual Voluntary Solution (IVS):
  Special count amount (not included actual FYC part) is capped at **HK$10,000** for Level 1 and **HK$18,750** for Level 2. If the policy belongs to both Integrated Healthcare Strategy (IHS) Product and Individual Voluntary Solution (IVS), 1.5 times special count can only apply once to the production.
  - Type 2: Blue Cross commission: Special count amount is capped at **HK$10,000** for Level 1 and **HK$18,750** for Level 2.
- #For new-joined financial planners contracted from 1 September 2025, active requirement is fulfilled as long as the financial planners are active during the month inforce with AIA.
- ^Exquisite Journey to Switzerland and MDRT Global No.1 Cash Award (Level 1-2) are mutually exclusive, according to whichever is higher.

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Exquisite Journey to Switzerland

Eligibility
All financial planners and agency leaders

Contest Period
July - September 2025 (3 months)

1) Basic Requirement & Awards: Producers who achieved designated qualification within the contest period will be invited to the **Exquisite Journey to Switzerland** .

- **Part 1: By Personal Production**

Reward (1): Producers who achieved **HK$1,200,000** FYC Benefit (including special count+) within the contest period will be invited to the **Exquisite Journey to Switzerland** .
FYC of **Integrated Healthcare Strategy (IHS)** [1] **Product** and **Individual Voluntary Solution (IVS)** [2] being delivered within the contest period will be **1.5 times** special counted+; **Blue Cross commission** [3, 4, 5] being delivered within the contest period will be **2 times** special counted+.
[Actual FYC Benefit requirement can be **HK$900,000** after special count+]

Reward (2): Ranking Challenge for special recognition at gala dinner
Qualifier who completed the basic requirement in 1) and invited to the **Exquisite Journey to Switzerland** is eligible for special recognition ranking challenge, **Top 10** Financial Planners ranked by **Actual** FYC Benefit will be recognized.

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- **Part 2: District/Agency and special recognition at gala dinner Ranking Challenge**

District Directors/Agency Leaders who achieved the below ranking within the contest period will be invited to the **Exquisite Journey to Switzerland** . **Ranking requirement is waived for PGDOY districts** – District Directors will be invited to the **Exquisite Journey to Switzerland** **simply by fulfilling the minimum requirements** ! Qualifier who completed the basic requirement in 1) and invited to the **Exquisite Journey to Switzerland** is eligible for special recognition ranking challenge, District Directors/Agency Leaders who achieved designated ranking by **Actual** FYC Benefit will be recognized.

Category		Requirements - Ranked by respective category					
		Production by	Reward (1): Being invited to the "Exquisite Journey to Switzerland"				Reward (2): Ranking Challenge for special recognition at gala dinner (by Actual FYC Benefit)
			Minimum Actual FYC Benefit	Minimum Actual FYC Benefit Growth rate compared to 2024 Quarter 3	Requirement	Rank	
(1)	Premier Grand Districts of the Year (PGDOY)[7]	District Production	HK$1,500,000	+25% Growth	Actual FYC Benefit Growth rate compared to 2024 Quarter 3	No limit	Top 3
(2)	Super Grand Districts of the Year (SGDOY)[7]					Top 3	Top 3
(3)	Grand Districts of the Year (GDOY)[7]					Top 2	Top 2
(4)	Districts of the Year (DOY)[7]					Top 1	Top 1
(5)	Agency Leader[#]	Agency Production		N/A	Actual FYC Benefit	Top 20	Top 5

2) Special Ranking Challenge for business class upgrade

Qualifier who completed the above 1) basic requirement is eligible for below special ranking challenge:

Category		Requirement – Ranked by Actual FYC Benefit	Reward
(1)	District Category[7]	Top 1 (by district production)	Upgrade to business class air ticket for qualifier
(2)	Agency Leader[#]	Top 1 (by agency production)	
(3)	Financial Planner	Top 1 (by personal production)	

Remarks:

- [+]**1.5 times special count** will be applied to FYC of **Integrated Healthcare Strategy (IHS) Product and Individual Voluntary Solution (IVS)** being delivered within the contest period, special count amount (not included actual FYC part) will be capped at **HK$60,000**. If the policy belongs to both Integrated Healthcare Strategy (IHS) Product and Individual Voluntary Solution (IVS), 1.5 times special count can only apply once to the production.
  2 times special count will be applied to **Blue Cross commission**, special count amount will be capped at **HK$240,000**.

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- Qualifiers are eligible to earn Reward once under the contest period:
  - If financial planner is qualified or ranked for awards by both "Personal Production" and "District/Agency Ranking Challenge", the qualifier will receive the award of "District/Agency Ranking Challenge".
  - If District Director is ranked for awards by both district and agency production, the qualifier will receive the award of the category in District/Agency Ranking Challenge with the highest ranking; if the ranks are the same or the District Director belongs to PGDOY category, District Director will receive the award of district category. The ranking freed up will be taken by thereafter qualifier in the respective category.
- #All Agency Leader are required to maintain a minimum of 6 career representatives (internship is excluded), i.e., 1 leader + 6 Financial Planners ("1+6"), in his/her direct agency as of 30 September 2025.
- Producers can only earn the award for "Special Ranking Challenge for business class upgrade" once. If a qualifier is ranked for awards in more than one category, the qualifier will be awarded according to above category sequence. The ranking freed up will be taken by thereafter qualifier in the respective category.
- Producers can only earn the award for "Special Ranking Challenge for special recognition at gala dinner" once. If a qualifier is ranked for awards in more than one category, the qualifier will receive the award of the category with the highest ranking. The ranking freed up will be taken by thereafter qualifier in the respective category.
- Airport tax & security tax, both in Hong Kong / Macau Airport and Airports of trip destination are excluded. The required expenses for the qualifiers will be debited from qualifiers' Company account automatically after the trip.
- Appeal is not entertained in the "District/Agency Ranking Challenge", "Special Ranking Challenge for business class upgrade" and "Ranking Challenge for special recognition at gala dinner".
- Exquisite Journey to Switzerland and MDRT Global No.1 Cash Award (Level 1-2) are mutually exclusive, according to whichever is higher.

Example

Contract Date	Active month in Aug - Sep	[A] Actual FYC Benefit (HK$) [Included IHS & IVS FYC before special count only, not included Blue Cross commission]	[B] IHS & IVS FYC achieved (HK$)	[C] Blue Cross commission achieved (HK$)	[A] + [B]*0.5+[C]*2 FYC Benefit included special count (HK$)	Achieved level
Jan 2023	2	1,100,000	90,000	55,000	1,255,000 [1,100,000 + 90,000*0.5+55,000*2]	Exquisite Journey to Switzerland
Jan 2023	1	1,100,000	100,000	130,000	1,390,000 [1,100,000+100,000*0.5+ 240,000] *Special count amount of Blue Cross commission is capped at 240,000 for respective level	Exquisite Journey to Switzerland
Sep 2025	1	350,000	40,000	8,000	384,750 [350,000 + 18,750 + 8,000*2] *Special count amount of IHS & IVS FYC is capped at 18,750 for respective level	MDRT Global No.1 Cash Award – Level 2

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Active Together in Action – Personal Level

Eligibility
All financial planners and agency leaders (by personal production)

Contest Period
July - September 2025 (3 months)

Contest Rules & Awards
Financial Planners who achieved **active producers**[6] during the contest period, the company will make a donation on their behalf to a charitable organization, Hong Chi Association; if active producers achieved 2025 Premier Advisor[#] on or before September 2025, the donation amount will be increased by fivefold.

2025 Premier Advisor[#] achieved 3-month active[6] ranked by FYC benefit will be invited to participate in AIA-exclusive voluntary activity arranged by Hong Chi Association.

Requirement	Company donation/Voluntary activity
Achieved Active Producer[6]	HK$10 for each active[6] month and each active producer
Achieved Active Producer for 2025 Premier Advisor[6#]	HK$50 for each active[6] month and each active 2025 Premier Advisor
1) Achieved 3-month Active[6]; AND 2) Achieved 2025 Premier Advisor[#] on or before September 2025; AND 3) Top 160 ranked by Donation amount^	Being invited to AIA-Exclusive Voluntary activity

Remarks:

- [#]Please refer to memo A250145 for 2025 Premier Advisor requirements.
- ^In case of ties with the same donation amount, the ranking will be determined by FYC Benefit within the contest period.

匡智會 Hong Chi Association
60 Anniversary 築夢・同行60載

Hong Chi is dedicated to quality service in educating, training and empowering people with intellectual disabilities and their families and to improve services on a continuous basis.

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Active Together in Action – District Recognition Challenge

Eligibility
All district Director (by district production)

Contest Period
July - September 2025 (3 months)

Contest Rules & Awards
For financial producers who fulfilled the company donation requirement in the above contest "Active Together in Action – Personal Level", the **districts with the highest accumulated donation amount** will be awarded with below prize:

Category	Requirement	Awards
Premier Grand Districts of the Year (PGDOY)[7]	**District with the highest accumulated donation amount (Top 1 for each category)** (HK$10 for each active[6] month and each active producer; HK$50 for each active[6] month and each active 2025 Premier Advisor)	Sponsoring Hong Chi Association's facilities under the name of the district
Super Grand Districts of the Year (SGDOY)[7]		
Grand Districts of the Year (GDOY)[7]		
Districts of the Year (DOY)[7]		

Remarks:

- In the event of a tie in the highest accumulated donation amount, the ranking will be determined by District total FYC Benefit during the contest period.

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Note:

1. For the Integrated Healthcare Strategy (IHS) Product list, please refer to the Appendix.
2. Individual Voluntary Solution (IVS) policy is qualified only if:
   (1) 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.
   (2) Serving civil servants and non-civil servants employed by the Government (including staff members of Legislative Council Secretariat and Housing Authority) and their families* (spouse and children) purchase a specified AIA Voluntary Health Insurance Scheme as policyholder or insured through any financial planner.

   *"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.
3. General Insurance Business defines as all general insurance policies issued by Blue Cross, including travel insurance, personal insurance, and commercial insurance.
4. General Insurance Business includes all cases submitted within Contest Period (including the first & last day), which are verified by Blue Cross (Asia Pacific) Insurance Limited and booked on or before end of respective contest period.
5. Blue Cross Commission will be calculated based on payable commission after deducting sales discounts.
6. Active Financial Planner refers to financial planners who have achieved at least 1 Approved Life case, or 1 Approved iPA case, or 1 Approved Group Insurance case, or 1 Approved Pension Corporate case, or 3 Approved Pension Retail cases.
7. District eligibility and category is in accordance to 2025 Annual Awards - only District Directors appointed on or before 1 January 2025 and maintain a full year production base in preceding sales year are eligible, excluding districts newly joined in the current sales year. For 2025 Annual Awards District category (DOY category), please refer to the relevant email sent in April 2025.

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General Rules & Regulations:

1. FYC Benefit on all Life, Life A&H Riders, Standalone Life A&H, PA, Group Insurance, Pension Corporate and Pension Retail will be counted.
2. Producers who have submitted policies/policies issued before the contest period but withdraw the captioned policy applications/cancel the captioned issued policies during the contest period and then reapply for the same products for the same insured, the corresponding case/FYC will not be counted.
3. Cases changed/lapsed from existing policies of the same insured will not be counted.
4. 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 contest completion.
5. 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.
6. 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.
7. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
8. The result of the challenge shall be adjusted according to the execution of cooling-off rights by policyowners of the policies. AIA will reserve the right to retract the award based on the result and any substantiated violations of required sales conduct.
9. All privileges are not refundable, transferrable nor payable, program is subject to AIA's final decision.
10. Subject to company's discretion, should any policies lapsed or premium reduced within 24-policy months, given the amount is greater than or equal to 15% of Life & PA FYC generated within the contest period, the corresponding Bonus will be re-assessed in accordance with the total net FYCB after adjustment. Any adjustment on Bonus amount in the results, will be clawed back regardless the producer is still inforce in AIA or not at the time being.
11. Re-selling of AIA Event/Sponsored Event's internal ticket, no matter they are free or bought from the Company, is prohibited in any forms; nor using event tickets as a solicitation to market insurance policies, including but not limited to:
    - offering gifts to clients / potential clients, as inducements to / rewards for clients' subscription of insurance policies (Insurance Authority's GL 25 – "Guideline on Offering of Gifts"); AND
    - reselling event tickets to anyone for benefit without Company's approval; AND
    - giving out tickets to clients or potential clients in any way (including lucky draws, contests, or games on social media) without Company's approval, whether any benefit or reward can be obtained

    Please refer to memo A250463 for more details.
12. Qualifiers must be inforce with AIA at the time the awards are paid out/ redeemed.
13. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability at any time without prior notice.
14. In the event of dispute, AIA's decision is final and conclusive.

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附件 Appendix - 綜合醫療保健策略 Integrated Healthcare Strategy (IHS)

產品 Products	
AIA Assemble 自在自選危疾保	Lady Care Pro 「摯愛您」保障計劃
AIA One Absolute AIA 唯一摯保	Level-Up Protect Cancer Plan 「進添」計劃 - 癌症保障系列
AIA One Absolute Pearl AIA 唯一摯保明珠	Level-Up Protect Pearl Cancer Plan 「進添明珠」計劃 - 癌症保障系列
AIA Voluntary Health Insurance Flexi Scheme AIA 自願醫保靈活計劃	Metro-Trio Pearl Medical and Critical Illness Protection Plan 「都市三保」醫療危疾保障計劃
AIA Voluntary Health Insurance Privilege Ultra Scheme AIA 自願醫保尊耀計劃	Multiple Care Pro 2 多重安心保 2
AIA Voluntary Health Insurance Standard Scheme AIA 自願醫保標準計劃	On Your Side Insurance Plan 2 「愛伴航」保險計劃 2
Cancer Care Essence 智護癌症保	On Your Side Insurance Plan 2 – First Gift 「愛伴航 – 首護摯寶」保險計劃
Cancer Guardian 3 癌症全方位保障 3 系列	Essence - On Your Side Insurance Plan (EOYS) 「簡緻•愛伴航」保險計劃
Cancer Guardian Pearl 3 癌症全方位明珠保障 3	OptimaCEO Medical Plan 極臻 • 至尊醫療計劃
CEO Essence Medical Plan 2 亞洲至尊醫療計劃 2	OptimaCEO Medical Plan - First Gift 極臻 • 至尊醫療計劃 — 首護摯寶
CEO Essence Pearl Medical Plan 2 亞洲至尊明珠醫療計劃 2	OptimaCEO Pearl Medical Plan 極臻 • 至尊明珠醫療計劃
CEO Medical 5 至尊醫療計劃 5	OptimaCEO Pearl Medical Plan - First Gift 極臻 • 至尊明珠醫療計劃 — 首護摯寶
CEO Pearl Medical 5 至尊明珠醫療計劃 5	Pretty Choice Rider Pro 「愛意」附加契約
EasyGuard Care Essence 守康易危疾保	Prime Care Pro 2 進泰安心保 2
Enhanced Critical Illness Rider Pro 特選危疾附加契約	Privilege Medical Rider 「尊顯」醫療附加契約
Executive Care Pro 2 泰然安心保 2	Privilege Ultra Medical Plan 尊耀醫療計劃
Flexi-MediGuard 靈活住院惠益保障計劃	Privilege Ultra Pearl Medical Plan 尊耀明珠醫療計劃
GBA Health Connect Outpatient Plan 大灣醫薈通門診計劃	Severe Illness Medical Protection Rider 嚴重疾病醫療保障附加契約
Health Journey Guardian 全程守護健康保系列	Severe Illness Pearl Medical Protection Rider 嚴重疾病明珠醫療保障附加契約
Here For You Refundable Hospital Cash 「常伴您」保費退還住院現金保障	Shield Up Cancer Protection Plan 「友愛護」癌症保障計劃
Here For You Refundable Surgical Cash 「常伴您」保費退還手術現金保障	Simple Care Essence 簡護危疾保
Hospital and Surgical Rider 「永無憂」住院及手術賠償附加契約	Simple Care Essence Pearl 「簡護危疾明珠保」
Hospitalization Benefit Rider 「樂無憂」住院惠益附加契約	Smart Elite Ultra 多重智倍保
Individual Medical Plan 「倍無憂」醫療保障計劃	StepUp Medical Protection Plan 2 「友心意」醫療保障計劃 2
Journey Protection Medical Plan 全程保醫療保障計劃	Super Good Health Medical Plan 2 特級「健康之寶」醫療保障計劃 2
Here For You Refundable Hospital/Surgical Cash 「常伴您」保費退還住院/手術現金保障	Super HealthGuard Pro 「進升危疾保障計劃」

更新

-包括「AIA 健康系列」之基本計劃及明珠版之基本計劃(如適用) Basic plans of "AIA Vitality Series" & Pearl Series are included (if applicable)

- 更新截至 2025 年 9 月 23 日 Updated as of 23 Sep 2025

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