友邦香港
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AIA Hong Kong
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183 Electric Road
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Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / SDDs / DDs / MICs / Agency Leaders / All Financial Planners (Hong Kong and Macau)	From:	Amy Chan Amelie Shen
Copy:	Mr. Alger Fung / Ms. Amy Chan / Ms. Amelie Shen / / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Agency Executives / IVS Executives / Contact Centre	Dept:	Corporate Solutions
Date:	28 August 2025	Total pages:	17
Subject:	(A250852) **2026 企業業務沖繩海外會議** **2026 Corporate Solutions Okinawa Overseas Convention**		

2026 企業業務沖繩海外會議正式啟動！

今年的競賽期**特別延長至 13 個月，並新增多個業務範疇的出席名額**，務求在會議中表揚更多於不同領域表現傑出的企業業務精英。請參閱下頁以了解詳盡的獲獎資格及安排。

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。

希望大家繼續積極參與各項業務爭取佳績。祝 業務蒸蒸日上！沖繩見！

2026 Corporate Solutions Okinawa Overseas Convention is now officially launched!

The contest period **has been extended to 13 months this year, and we have also added more qualifying seats on different business sectors**! This ensures that more **Corporate Solutions** elite producers who have achieved outstandingly in different Corporate Solutions business lines can be recognized at this convention! Please refer to the Appendix for the awards details.

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

Let's keep up the momentum and continue driving strong engagement across all business initiatives to deliver exceptional results. Wishing you every success! See you in Okinawa!

Yours faithfully,

Amy Chan
Chief Agency Officer
AIA Hong Kong and Macau

Amelie Shen
Chief Corporate Solutions Officer
AIA Hong Kong and Macau

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2026 企業業務沖繩海外會議

目的地： **日本沖繩（4 日 3 夜）**
競賽日期： **2025 年 3 月 1 日至 2026 年 3 月 31 日（共 13 個月）**

「2026 企業業務沖繩海外會議」競賽項目一覽：

競賽級別+	合資格營業同事	競賽項目		獲取資格方法
財務策劃顧問	所有財務策劃顧問、營業主管及區域總監	**達標 100% 至 300% 即獲出席名額**	A：退休金（個人業務） B：退休金（企業業務） C：團體保險（新生意） D：團體保險（新生意 + 續保生意增長）	以個人業績計算
		排名賽	E：新晉財務策劃顧問 (退休金 / 團體保險) F：IVS 友得揀營業精英排名賽─財務策劃顧問	
營業主管	所有營業主管（區域總監除外）	**達標 100%即獲出席名額**	A：退休金（個人業務） B：退休金（企業業務） C：團體保險（新生意） D：團體保險（新生意 + 續保生意增長）	以營業組別業績計算
		排名賽	F：IVS 友得揀營業精英排名賽─營業主管	
區域總監	所有區域總監或以上	**達標 100%即獲出席名額**	A：退休金（個人業務） B：退休金（企業業務） C：團體保險（新生意） D：團體保險（新生意 + 續保生意增長）	以區域業績計算
		排名賽	F：IVS 友得揀營業精英排名賽─區域總監 **<新增> G：最高增長區域排名賽─退休金牌照** **<新增> H：最高增長區域排名賽─企業業務業績**	

+ 合資格競賽級別以截至 2025 年 8 月 1 日之公司紀錄計算。此日期後之任何級別升遷，將不獲計算於是次競賽之最終業績。例子：如營業同事於 2025 年 8 月 1 日之公司紀錄為財務策劃顧問；於 2026 年 1 月 1 日晉升為資深分區經理。惟此競賽只計算截至 2025 年 8 月 1 日之公司紀錄，故只能參與財務策劃顧問級別相關之競賽項目。

競賽規則及獎賞：

適用於競賽項目 A-D

- 營業同事只需於競賽期內成功**於競賽項目 A-D 中以任何一個競賽級別達至最少 100% 業績要求**，即可獲邀出席「2026 企業業務沖繩海外會議」。
- **營業同事於每個競賽項目中，只可以一個競賽級別作最終業績計算。**如營業同事於同一競賽項目中，有多於 1 項競賽級別達到最低要求，**最終業績將以較高業績達標率為先。**例子：如營業同事同時於「競賽項目 A：退休金（個人業務）」之「財務策劃顧問級別」達至 200% 業績要求及「區域總監級別」達至 100% 業績要求，則以「財務策劃顧問級別」所得之 200%計算為此競賽項目之最終業績。

適用於競賽項目 E-H

- 營業同事只需於競賽期內成功**於競賽項目 E-H 中之指定業績要求及獲得指定名次**，即可獲邀出席「企業業務海外會議 2025」。
- **營業同事於每個競賽項目中，只可以一個競賽級別作最終業績計算。**如營業同事於同一競賽項目中，有多於 1 項競賽級別達至指定要求，**最終業績將以較高排名之競賽級別為先**，其後則以較高業績達標率為先。例子：如營業同事同時於競賽項目 F 之「IVS 友得揀營業主管排名賽」取得首 1 名及「IVS 友得揀區域總監排名賽」取得首 3 名及，則以「IVS 友得揀營業主管排名賽」所得之首 1 名計算為此競賽項目之最終業績。

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競賽項目及業績要求

A：退休金（個人業務）/ B：退休金（企業業務）

100%業績要求

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
A. 退休金 個人業務	財務策劃顧問 – 個人業績	A1	750,000	不適用	60	24
	營業主管 – 營業組別業績	A2	1,500,000		180	90
	區域總監 – 區域業績	A3	3,000,000		540	360
B. 退休金 企業業務	財務策劃顧問 – 個人業績	B1	不適用	1,500,000	6	18
	營業主管 – 營業組別業績	B2		3,000,000	60	72
	區域總監 – 區域業績	B3		6,000,000	180	360

200%業績要求（只適用於財務策劃顧問 – 個人業績達標資格）

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
A. 退休金 個人業務	財務策劃顧問 – 個人業績	A1	1,500,000	不適用	60	24
B. 退休金 企業業務	財務策劃顧問 – 個人業績	B1	不適用	3,000,000	6	18

300%業績要求（只適用於財務策劃顧問 – 個人業績達標資格）

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
A. 退休金 個人業務	財務策劃顧問 – 個人業績	A1	2,250,000	不適用	60	24
B. 退休金 企業業務	財務策劃顧問 – 個人業績	B1	不適用	4,500,000	6	18

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C：團體保險（新生意）/ D：團體保險（新生意 + 續保生意）

100% 業績要求★

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
C. 團體保險新生意	財務策劃顧問 – 個人業績	C1	625,000	不適用	2	12
	營業主管 – 營業組別業績	C2	1,250,000		6	40
	區域總監 – 區域業績	C3	2,500,000		12	400
D. 團體保險新生意 + 續保生意增長	財務策劃顧問 – 個人業績	D1	不適用	1,875,000	1	24
	營業主管 – 營業組別業績	D2		3,750,000	4	60
	區域總監 – 區域業績	D3		7,500,000	8	400

200% 業績要求（只適用於財務策劃顧問 – 個人業績達標資格）

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
C. 團體保險新生意	財務策劃顧問 – 個人業績	C1	1,250,000	不適用	4	24
D. 團體保險新生意 + 續保生意增長	財務策劃顧問 – 個人業績	D1	不適用	3,750,000	2	48

300% 業績要求（只適用於財務策劃顧問 – 個人業績達標資格）

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
C. 團體保險新生意	財務策劃顧問 – 個人業績	C1	1,875,000	不適用	6	36
D. 團體保險新生意 + 續保生意增長	財務策劃顧問 – 個人業績	D1	不適用	5,625,000	3	72

★ 全新團體保險度身訂造計劃特別推廣獎賞

- 推廣期：2025 年 8 月 1 日至 2026 年 3 月 31 日
- 合資格新生意：「智悠選」團體保險計劃 3，全天候僱員意外保障，全天候僱員意外保障增強版及澳門「顧」員意外保。
- 於推廣期內，所有合資格全新團體保險度身訂造計劃之 ANP 及保單數目均可獲**額外 3 倍業積計算**！
- 獎賞只適用於競賽項目 C 至 D 及 E3，並只計算首 50% 相關業績，即各級別之最高可獲額外計算業積分別為：財務策劃顧問級別：HK$312,500；營業主管級別：HK$625,000；區域總監級別：HK$1,250,000。

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E：新晉財務策劃顧問排名賽

新晉營業同事是指於 2025 年 1 月 1 日起計，其首次加入 AIA 的時間不超過 24 個月之營業同事。

100% 退休金業績要求：

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總個人業務 ANP[1,3] (HK$)	總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	IVS 保單數目 [6-12]
退休金 個人業務	首 3 名新晉財務策劃顧問 – 個人業績	E1	380,000	不適用	30	10
退休金 企業業務	首 3 名新晉財務策劃顧問 – 個人業績	E2	不適用	760,000	4	8

- 競賽結果將根據以下成績排名：核心業務 ANP > 個人業務個案數目 > IVS 保單數目。

100% 團體保險業績要求：

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求			
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	新團體保險保單數目 [16]	IVS 保單數目 [6-12]
團體保險 新生意	首 3 名新晉財務策劃顧問 – 個人業績	E3	312,500	不適用	2	6

- 競賽結果將根據以下成績排名：核心業務 ANP > 新團體保險保單數目 > IVS 保單數目。

F：IVS 友得揀營業精英排名賽

100% 業績要求：

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求	
			IVS 保單數目 [6-12]	總 IVS FYC [6-12] (HK$)
IVS 友得揀	首 15 名財務策劃顧問 – 個人業績取得最高 IVS 保單數目	F1	30	300,000
	首 5 名營業主管 – 營業組別業績取得最高 IVS 保單數目	F2	105	850,000
	首 3 名區域總監 – 區域業績取得最高 IVS 保單數目	F3	360	2,000,000

- 競賽結果將根據以下成績排名：IVS 保單數目 > 總 IVS FYC。

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<新增> G：最高增長區域排名賽–退休金牌照

業績要求：

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求
			新登記退休金中介人牌照之財務策劃顧問數目
退休金牌照登記增長	首 5 名區域總監 – 比較上年同期，區域取得最高新登記退休金牌照之增長比率	G	20

- 新登記退休金中介人牌照之財務策劃顧問於競賽期內離職仍可獲計算在內。
- 競賽結果將根據以下成績排名：增長人數 > 增長比率。
- 增長比率將以上年同期之新登記退休金中介人牌照之財務策劃顧問數目作比較。如上年同期並未有任何財務策劃顧問新登記退休金中介人牌照，該區域則不合資格參與此競賽項目。

<新增> H：最高增長區域排名賽–企業業務業績

業績要求：

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求		
			總企業業務 ANP[2,3] (HK$)	個人業務個案數目 [4,5]	相關業績增長比率
退休金個人業務	首 1 名區域總監 – 比較上年同期，區域錄得最高退休金個人業務個案數目增長比率	H1	不適用	270	30%
退休金企業業務	首 1 名區域總監 – 比較上年同期，區域錄得最高退休金總企業業務 ANP 增長比率	H2	3,000,000	不適用	30%

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求		
			總新生意 ANP[13,15,16] (HK$)	總 ANP[14,15,16] (HK$)	相關業績增長比率
團體保險新生意	首 1 名區域總監 – 比較上年同期，區域錄得最高團體保險新生意 ANP 增長比率	H3	1,500,000	不適用	30%
團體保險新生意 + 續保生意增長	首 1 名區域總監 – 比較上年同期，區域錄得最高團體保險 ANP 增長比率	H4	不適用	4,500,000	30%

競賽項目	競賽級別	競賽項目編號	得獎者必須於競賽期內符合下列每項最低要求	
			IVS 保單數目 [6-12]	相關業績增長比率
IVS 友得揀	首 1 名區域總監 – 比較上年同期，區域錄得最高 IVS 保單數目增長比率	H5	180	30%

- 所有得獎者必須於競賽項目 A-D 以區域總監級別達至最少 100% 業績。
- 競賽結果將根據增長比率排名。
- 增長比率將以上年同期之相關業績作比較。如上年同期並未有錄得任何相關業績，該區域則不合資格參與此競賽項目。

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獎賞

累積達標比率及出席名額計算方式

每名合資格出席「 2026 企業業務沖繩海外會議」之得獎者**可透過各競賽項目相應之業績要求獲得最多一個會議席位**。如果營業同事於**多個競賽項目中達至最少 100% 業績要求，所有達標比率將可獲累積計算**以獲取更多獎賞。累計達標比率以 **300% 為上限**。請參考以下示例以瞭解不同的業績累計方法。

累積 達標比率	合資格 獲業績累積計算的組別	可邀請 同行嘉賓數目	來回團體機票	酒店住宿 （4 日 3 夜）
100%	組別 A 至 D	不適用	經濟客位 1 張	雙人房 （與另一位得獎者各佔半房）
200%*				**單人房 1 間**
300%**		1 位	經濟客位 2 張	**雙人房 1 間** （與同行嘉賓同房）

*200% 業績要求 = 達至競賽項目指定業績要求之 2 倍或多於 1 個競賽項目中之累計達標比率。

**300% 業績要求 = 達至競賽項目指定業績要求之 3 倍或多於 1 個競賽項目中之累計達標比率。

示例	競賽級別	競賽項目								實際達標	累計達標比率
		A	B	C	D	E	F	G	H		
1	財務策劃顧問	A1 (200%)				E1 (Top 1)				200%	**200%**
2	財務策劃顧問	A1 (100%)	B1 (100%)		D1 (100%)					300%	**300%**
3	財務策劃顧問	A1 (200%)	B1 (100%)	C1 (100%)	D1 (100%)		F1 (Top 2)			500%	**300%**
4	營業主管	A1 (100%)								100%	**100%**
5	營業主管	A1 (200%) ~~A2 (100%)~~					F2 (Top 1)			200%	**200%**
6	營業主管	A2 (200%)	B2 (100%)		D2 (100%)					400%	**300%**
7	區域總監	A3 (100%)	B3 (100%)				F1 (Top 1)			200%	**200%**
8	區域總監	~~A1 (100%)~~ A3 (300%)	B3 (100%)	C1 (100%)			F3 (Top 1)	G (Top 3)	H1 (Top 1)	500%	**300%**

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[AIA – INTERNAL]

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各競賽項目首 1 名額外獎賞

競賽項目 A-D 及 F 之**首 1 名得獎者**將可獲得**額外現金獎賞 HK$ 8,000**！

競賽項目	競賽級別	競賽項目編號	競賽項目排名	獎賞 [17]
A. 退休金 (個人業務)	財務策劃顧問 – 個人業績	A1	**首 1 名** (共 15 個名額)	**額外現金獎賞 HK$ 8,000**
	營業主管 – 營業組別業績	A2		
	區域總監 – 區域業績	A3		
B. 退休金 (企業業務)	財務策劃顧問 – 個人業績	B1		
	營業主管 – 營業組別業績	B2		
	區域總監 – 區域業績	B3		
C. 團體保險 (新生意)	財務策劃顧問 – 個人業績	C1		
	營業主管 – 營業組別業績	C2		
	區域總監 – 區域業績	C3		
D. 團體保險 (新生意 + 續保生意增長)	財務策劃顧問 – 個人業績	D1		
	營業主管 – 營業組別業績	D2		
	區域總監 – 區域業績	D3		
F. IVS 友得揀	財務策劃顧問 – 個人業績	F1		
	營業主管 – 營業組別業績	F2		
	區域總監 – 區域業績	F3		

一般規則及要求：

1) 退休金個人業務 ANP 之定義：

適用於香港區：

- 退休金個人業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的「休悠樂」計劃、客戶尊享強積金個人賬戶計劃、AIA 強積金可扣稅自願性供款 (「TVC」) 計劃及自僱人士計劃之首年供款及由其他受託人轉入相關資產之 10%，並須於 2026 年 3 月 31 日或之前入賬。強積金可扣稅自願性供款計劃之首年供款及資產轉移各自的計算上限均為 ANP HK$60,000，而自僱人士向友邦強積金計劃所作之首年供款及資產轉移計算上限則為 ANP HK$120,000。

適用於澳門區：

- 退休金個人業務 ANP 包括於競賽期內成功由 AIA 企業業務為客戶處理的首年供款及由其他基金管理實體 / 澳門政府管理子賬戶之央積金和私退金轉入相關資產之 10%，並須於 2026 年 3 月 31 日或之前入賬。

2) 退休金企業業務 ANP 之定義：

適用於香港區：

- 退休金企業業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的強積金僱主計劃 (MPF) 及職業退休計劃 (ORSO) 之首年供款及由其他受託人轉入相關資產之 10%。

適用於澳門區：

- 退休金企業業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的首年供款及由其他基金管理實體 / 澳門政府管理子賬戶之非強制性中央公積金 (「央積金」) 僱主計劃和澳門私人退休金 (「私退金」) 僱主計劃轉入相關資產之 10%。

3) 如果申請屬共同個案 (即個案由 2 名或以上營業同事共同完成) ，每名營業同事獲計算之 ANP 將按比例分配。

4) **適用於香港區：**合資格個案 (UID) 是指於競賽期內就自僱人士計劃、「休悠樂」計劃、客戶尊享強積金個人帳戶計劃及強積金可扣稅自願性供款計劃所處理之「退休金個人個案」。

適用於澳門區：合資格個案 (UID) 是指於競賽期內就央積金個人計劃所處理之「退休金個人個案」。如個案數目相同，則以 ANP 排名計算。

5) 如果申請屬共同個案 (即個案由 2 名營業同事共同完成) ，每名營業同事將獲計算 0.5 宗個案，且個案不會以四捨五入方式計算。

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、「友愛護」癌症保障計劃及「意安心升級保障」) ：

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- 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Δ（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。

Δ「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) IVS「友得揀」保單持有人或受保人必須於投保及保單繕發時仍然為相關強積金 / 退休金 / 團體保險成員。

8) 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。

9) 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，相關保單數目將不獲計算。

10) 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。

11) 若保單由兩位或以上營業同事共同完成，相關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。

12) 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。

13) 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）。

14) 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）。

15) 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。

16) 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。

17) 營業同事最多只能於「競賽項目首 1 名額外獎賞」中獲獎一次。若得獎者同時於 2 個或以上子組別中名列榜首，將以較高級別獎項為先，其後則以較高業績（達標率）的子組別獎項為先；而該得獎者所獲的其他獎項將**不會**由相應競賽項目的下一位合資格者後補獲取。

18) 在任何情況下，營業同事最多只能於本競賽中取得 300% 達標組別一次。

19) 營業同事需繳付香港 / 澳門及會議目的地相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。

20) 營業同事遞交保單申請予 AIA，應預留充足時間以確保有關申請已於截數前由 AIA 及 / 或已授權之單位收妥。

21) 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，不得因獎項而對客戶作特定銷售建議。

22) 競賽結果以保單冷靜期後作調整為準。AIA 保留就調整後之排名結果及就任何違規銷售行為追討已發放獎賞之權利。

23) 所有獲獎者必須於獎項及嘉許發放時仍與 AIA 保持有效合約關係。獎項及嘉許不可轉讓及轉換現金。

24) 友邦保留隨時修改本競賽活動規則之權利，恕不另行通知。如有任何爭議，友邦保留最終決定權。

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2026 Corporate Solutions Okinawa Overseas Convention

Destination: Okinawa, Japan (4-day/3-night)
Contest Period: 1 March 2025 – 31 March 2026 (13 Months)

Summary of contest items for the "2026 Corporate Solutions Okinawa Overseas Convention":

Contest Group+	Eligibility	Contest Items		Qualified by
Financial Planner	All Financial Planners, Agency Leaders and District Directors	Quota Buster with 100% - 300% Achievement	A: Pension (Retail Business) B: Pension (Corporate Business) C: Group Insurance (New Business) D: Group Insurance (New + Renewal Business Growth)	By Individual Production
		By Ranking	E: Newly Joined Financial Planner (Pension / Group Insurance) F: Top IVS Producers Challenge - Financial Planners	
Agency Leaders	All Agency Leaders (except District Directors or above)	Quota Buster with 100% Achievement	A: Pension (Retail Business) B: Pension (Corporate Business) C: Group Insurance (New Business) D: Group Insurance (New + Renewal Business Growth)	By Agency Unit Production
		By Ranking	F: Top IVS Producers Challenge – Agency Leaders	
District Directors	All District Directors or above	Quota Buster with 100% Achievement	A: Pension (Retail Business) B: Pension (Corporate Business) C: Group Insurance (New Business) D: Group Insurance (New + Renewal Business Growth)	By District Production
		By Ranking	F: Top IVS Producers Challenge – District Directors <NEW> G: Top District with Best Growth in Pension Licensing <NEW> H: Top District with Best Growth in CS Business	

+ The eligible contest group is calculated based on the company records as of August 1, 2025. Any title promotion after this date will not be counted towards the final performance of this contest. Example: If the Producer is recorded as a Financial Planners in the company record as of August 1, 2025, and is promoted to Senior Unit Manager on January 1, 2026, only the company record as of August 1, 2025, will be considered for this competition. Therefore, the Producer can only participate in the contest items related to the Financial Planner group.

Contest Rules and Rewards:

Applicable to Contest Item A-D:

- During the contest period, Producers who successfully **achieve a minimum of 100% of production requirements in any contest group in contest items A-D** will be invited to join the "2026 Corporate Solutions Okinawa Overseas Convention".
- **Producers may only attain one contest group in each contest items for final achievement calculation.** If the Producer achieves the minimum requirements for more than 1 contest group in the contest items, **only the one with the highest achievement rate will be counted**. For example, if the Producer achieves 200% and 100% of the performance requirement in the contest group "Financial Planners" and "District Director Level" respectively in "Contest item - A: Pensions (Retail Business)", the 200% performance requirement for the contest group "Financial Planners" will be counted as the final result of the contest.

Applicable to Contest Item E-H:

- During the contest period, Producers who successfully **achieve the designated minimum production and ranking requirements in contest items E-H** will be invited to join the "2026 Corporate Solutions Okinawa Overseas Convention".
- **Producers may only attain one contest group in each contest items for final achievement calculation.** If the Producer achieves the designated minimum requirement for more than 1 contest group in the same contest item, **the one with the higher ranking will be counted**, then follow by the one with the higher production achievement rate. For example, if the Producer has ranked Top 1 and Top 3 in the contest group of "Agency Leaders" and "District Director "respectively in the contest item F, "Top IVS Producers Challenge", the Top 1 ranking achieved in the contest group of "Top IVS Producers Challenge Agency Leaders" will be counted as the final result of the contest.

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Contest Items and Production Requirement
A: Pension (Retail Business) / B: Pension (Corporate Business)

100% Production Requirements:

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total Retail ANP[1,3] (HK$)	Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	IVS Case Count[6-12]
A. Pension Retail Business	Financial Planner – by individual production	A1	750,000	N/A	60	24
	Agency Leader – by agency production	A2	1,500,000		180	90
	District Director – by district production	A3	3,000,000		540	360
B. Pension Corporate Business	Financial Planner – by individual production	B1	N/A	1,500,000	6	18
	Agency Leader – by agency production	B2		3,000,000	60	72
	District Director – by district production	B3		6,000,000	180	360

200% Production Requirements – Only applicable to Financial Planner by Individual Production

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total Retail ANP[1,3] (HK$)	Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	IVS Case Count[6-12]
A. Pension Retail Business	Financial Planner – by individual production	A1	1,500,000	N/A	60	24
B. Pension Corporate Business	Financial Planner – by individual production	B1	N/A	3,000,000	6	18

300% Production Requirements – Only applicable to Financial Planner by Individual Production

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total Retail ANP[1,3] (HK$)	Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	IVS Case Count[6-12]
A. Pension Retail Business	Financial Planner – by individual production	A1	2,250,000	N/A	60	24
B. Pension Corporate Business	Financial Planner – by individual production	B1	N/A	4,500,000	6	18

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C: Group Insurance (New Business) / D: Group Insurance (New + Renewal Business)

100% Production Requirement ★

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	New Group Insurance Case Count[16]	IVS Case Count[6-12]
C. Group Insurance New Business	Financial Planner – by individual production	C1	625,000	N/A	2	12
	Agency Leader – by agency production	C2	1,250,000		6	40
	District Director – by district production	C3	2,500,000		12	400
D. Group Insurance New Business + Renew Business Growth	Financial Planner – by individual production	D1	N/A	1,875,000	1	24
	Agency Leader – by agency production	D2		3,750,000	4	60
	District Director – by district production	D3		7,500,000	8	400

200% Production Requirement – Only applicable to Financial Planner by Individual Production

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	New Group Insurance Case Count[16]	IVS Case Count[6-12]
C. Group Insurance New Business	Financial Planner – by individual production	C1	1,250,000	N/A	4	24
D. Group Insurance New Business + Renew Business Growth	Financial Planner – by individual production	D1	N/A	3,750,000	2	48

300% Production Requirement – Only applicable to Financial Planner by Individual Production

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	New Group Insurance Case Count[16]	IVS Case Count[6-12]
C. Group Insurance New Business	Financial Planner – by individual production	C1	1,875,000	N/A	6	36
D. Group Insurance New Business + Renew Business Growth	Financial Planner – by individual production	D1	N/A	5,625,000	3	72

★ Special Rewards for new Group Insurance Tailor-Made Plan

- Promotion Period: 1 August 2025 – 31 March 2026
- Eligible new business: Flexi Pack 3, GPA Choice, GPA Choice Plus and GPA Choice Macau
- During the promotion period, all eligible new group insurance tailor-made plans will be eligible for **extra 3 times of the total ANP and case count**!
- Rewards are only applicable to Contest Item C-D and E3, and only the first 50% of relevant production will be counted. i.e., The highest extra production count for each contest groups will be HK$312,500, HK$625,000 and HK$1,250,000 for the Financial Planner, Agency Leader and District Director respectively.

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E: Ranking Challenge for Newly Joined Financial Planners

New producers refer to producers who have first joined AIA for no more than 24 months prior to 1 January 2025.

100% Production Requirement – Pensions:

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total Retail ANP[1,3] (HK$)	Total Retail ANP[1,3] (HK$)	Total Retail ANP[1,3] (HK$)	Total Retail ANP[1,3] (HK$)
Pension Retail Business	Top 3 Newly joined Financial Planner – by individual production	E1	380,000	N/A	30	10
Pension Corporate Business	Top 3 Newly joined Financial Planner – by individual production	E2	N/A	760,000	4	8

- The results will be ranked by core business ANP first, then by retail case count and finally by IVS case count.

100% Production Requirement – Group Insurance:

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following minimum requirements within contest period			
			Total New Business ANP[13,15,16] (HK$)	Total New Business ANP[13,15,16] (HK$)	Total New Business ANP[13,15,16] (HK$)	Total New Business ANP[13,15,16] (HK$)
Group Insurance New Business	Top 3 Newly joined Financial Planner – by individual production	E3	312,500	N/A	2	6

- The results will be ranked by core business ANP first, then by new group insurance case count and finally by IVS case count.

F：Top IVS Producers Challenge

100% Production Requirement:

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following min. requirements within contest period	
			IVS Case Count[6-12]	Total IVS FYC (HK$) [6-12]
IVS	Top 15 Financial Planner – Highest IVS Case Count by individual production	F1	30	300,000
	Top 5 Agency Leader – Highest IVS Case Count by agency production	F2	105	850,000
	Top 3 District Director – Highest IVS Case Count by district production	F3	360	2,000,000

- The results will be ranked by IVS case count first, and then by Total IVS FYC.

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<NEW> G: Top District with Best Growth in Pension Licensing

Production Requirement:

Contest Item	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following min. requirements within contest period
			No. of Financial Planners newly registered as Pension Intermediaries
Best Growth in Pension Licensing	Top 5 District Director – Highest growth rate in new Pension Licensing by district achievement in the same period of previous year	G	20

- New licensed agent but terminated during the contest period will also be counted.
- The results will be ranked by the no. then the ratio of the growth in Financial Planners newly registered as Pension Intermediaries.
- The growth rate is calculated by comparing the number of financial planners who registered for new pension intermediary licenses in the same period of the previous year. If no financial planners registered for new pension intermediary licenses in the same period of the previous year, the region is not eligible to this contest item.

<NEW> H: Top District with Best Growth in CS Business

Production Requirement:

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following min. requirements within contest period		
			Total Corporate ANP[2,3] (HK$)	Retail Case Count[4,5]	Related Production Growth Ratio
Pension Retail Business	Top 1 District Director – Highest growth rate in Pension Retail case count by district production in the same period of previous year	H1	N/A	270	30%
Pension Corporate Business	Top 1 District Director – Highest growth rate in Total Corporate ANP by district production in the same period of previous year	H2	3,000,000	N/A	30%

Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following min. requirements within contest period		
			Total New Business ANP[13,15,16] (HK$)	Total ANP[14,15,16] (HK$)	Related Production Growth Ratio
Group Insurance New Business	Top 1 District Director – Highest growth rate in Total Group Insurance New Business ANP by district production in the same period of previous year	H3	1,500,000	N/A	30%
Group Insurance New + Renew Business Growth	Top 1 Agency Leader – Highest growth rate in Total Group Insurance ANP by district production in the same period of previous year	H4	N/A	4,500,000	30%

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Contest Items	Contest Group	Contest Item Reference No.	Qualifiers must achieve each of the following min. requirements within contest period	
			IVS Case Count[6-12]	Related Production Growth Ratio
IVS	**Top 1 District Director** – **Highest growth rate in IVS case count** by district production in the same period of previous year	H5	180	30%

- Qualifiers must achieve a minimum of 100% production requirement in contest item A-D at the contest group of District Directors.
- The results will be ranked by the ratio of growth.
- The growth rate will be compared with the relevant results of the same period of the previous year. If there are no relevant results in the same period of the previous year, the district is not eligible to the contest item.

Rewards

Calculation for cumulative achievement ratio and attendance quota

Each eligible qualifier of the "2026 Corporate Solutions Okinawa Overseas Convention" **will receive a maximum of 1 seat by achieving the designated production requirements for each contest item**. If Financial Planners **achieve at least 100% performance requirements across multiple contest items, all achievement ratios will be cumulative** for additional rewards. The cumulative achievement ratio is **capped at 300%**. Please refer to the examples below to illustrate different performance accumulation methods.

Cumulative Achievement Ratio	Contest Items eligible for Cumulative Achievement	Eligible Guest quota	Round-Trip Group Flight Ticket	Hotel Accommodation (4-day/3-night)
100%	A - D	N/A	Economy Class x 1	Twin room (Sharing between 2 qualifiers)
200%*				**One Single Room**
300%**		1 seat	Economy Class x 2	**One Twin Room** (Sharing with Eligible Guest)

*200%: Achieve twice the production requirement of the contest item or the cumulative achievement ratio in more than one contest item.

*300%: Achieve triple the production requirement of the contest item or the cumulative achievement ratio in more than one contest item.

Example	Contest Group	Contest Items								Actual Achievement	Max. cap of Cumulative Achievement Ratio
		A	B	C	D	E	F	G	H		
1	Financial Planner	A1 (200%)				E1 (Top 1)				200%	**200%**
2	Financial Planner	A1 (100%)	B1 (100%)		D1 (100%)					300%	**300%**
3	Financial Planner	A1 (200%)	B1 (100%)	C1 (100%)	D1 (100%)		F1 (Top 2)			500%	**300%**
4	Agency Leader	A1 (100%)								100%	**100%**
5	Agency Leader	A1 (200%) ~~A2 (100%)~~					F2 (Top 1)			200%	**200%**
6	Agency Leader	A2 (200%)	B2 (100%)		D2 (100%)					400%	**300%**
7	District Director	A3 (100%)	B3 (100%)				F1 (Top 1)			200%	**200%**
8	District Director	~~A1 (100%)~~ A3 (300%)	B3 (100%)	C1 (100%)			F3 (Top 1)	G (Top 3)	H1 (Top 1)	500%	**300%**

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Extra Rewards for Top 1 Qualifier in Each Contest Item

Top 1 qualifier **in each contest item** A-D and F will receive **extra cash reward of HK$8,000**!

Contest Items	Contest Group	Contest Items Reference No.	Ranking in Group	Rewards
A. Pension (Retail Business)	Financial Planner – by individual production	A1	**Top 1** (15 qualifiers in total)	**Extra Cash Reward HK$8000**
	Agency Leader – by agency production	A2		
	District Director – by district production	A3		
B. Pension (Corporate Business)	Financial Planner – by individual production	B1		
	Agency Leader – by agency production	B2		
	District Director – by district production	B3		
C. Group Insurance (New Business)	Financial Planner – by individual production	C1		
	Agency Leader – by agency production	C2		
	District Director – by district production	C3		
D. Group Insurance (New Business + Renew Business Growth)	Financial Planner – by individual production	D1		
	Agency Leader – by agency production	D2		
	District Director – by district production	D3		
F. IVS	Financial Planner – by individual production	F1		
	Agency Leader – by agency production	F2		
	District Director – by district production	F3		

General Rules and Requirements:

1) The definition of Pension Retail business ANP:

Applicable to Hong Kong:
- Pension Retail business ANP includes the Total First Year Contribution and 10% of relevant Assets Taken Over ("ATO") transferred from other trustees for AIA MPF Personal Account ("MPFPA"), Preferential Deferred Member ("PDM") account, AIA MPF Tax Deductible Voluntary Contribution Account ("TVC") and Self-Employed Person ("SEP") Plan successfully settled by AIA Corporate Solutions within the Contest Period on or before 31 March 2026. The total crediting limit of First Year Contribution and ATO for each TVC account is HK$60,000 in ANP production per category. The total crediting limit of First Year Contribution and ATO made by each SEP account to the AIA MPF scheme is HK$120,000 in ANP production.

Applicable to Macau:
- Pension Retail business ANP includes the Total First Year Contribution and 10% of relevant ATO from other fund management entities or government-managed sub-accounts of CPF and PPF successfully settled by AIA Corporate Solutions within the Contest Period on or before 31 March 2026.

2) The definition of Pension Corporate business ANP:

Applicable to Hong Kong:
- Pension Corporate business ANP includes the Total First Year Contribution and 10% of relevant ATO transferred from other trustees for MPF Employer Plan and ORSO Employer Plan successfully settled by AIA Corporate Solutions within the Contest Period.

Applicable to Macau:
- Pension Corporate business ANP includes the Total First Year Contribution and 10% of relevant ATO from other fund management entities or government-managed sub-accounts of Non-Mandatory Central Provident Fund ("CPF") Scheme Employer Plan and Private Pension Fund ("PPF") Scheme Employer Plan successfully settled by AIA Corporate Solutions within the Contest Period.

3) If the qualified cases are jointly closed by two or more producers, the ANP allocated for each producer will be shared in proportion.

4) **Applicable to Hong Kong:** An eligible case (Unique Identification - UID) refers to a "Pension Retail Case" processed for MPFPA account, PDM account, TVC account and SEP Plan during the Contest period. In case the case count number is the same, it will be ranked by ANP production.

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Applicable to Macau: An eligible case (UID) refers to a "Pension Retail Case" processed for central provident fund account during the Contest period. In case the case count number is the same, it will be ranked by ANP production.

5) If the qualified cases are jointly closed by two producers, 0.5 cases will be counted for each producer. Case count calculation will not be rounded-up.
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) The policyholder or insured of IVS policy must still be a relevant MPF/pension/group insurance member at the time of application and policy issuance.
8) Eligible IVS policies will only be counted if they are submitted via iPoS and issued within the Contest Period.
9) Financial Planners who have submitted policies/policies issued before the Contest Period and then reapply for the same products with the same insured, the corresponding policies will NOT be counted.
10) The relevant policy count of policy changed/lapsed from existing policies of the same policyholder or insured will NOT be counted.
11) If the policy is jointly completed by two or more Financial Planners, the relevant Policy Count will be evenly shared in proportion while Policy Count will not be rounded-up.
12) All new policies purchased under the same insured for the same basic plan and same premium payment period during the Contest Period will be counted as one policy.
13) 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).
14) 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).
15) Eligible Group Insurance new business policy(ies) must have the first year's premium successfully settled within the Contest Period.
16) 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 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.
17) Producers can only receive the "Extra Rewards for Top 1 Qualifier in Each Contest Item" award once. If a producer is qualified for Rank 1 for more than one sub-category or level, the higher-level award will be granted first, then followed by the sub-category with higher achievement rate; the other award(s) gained by this qualifier will **NOT** be granted to the next eligible qualifier(s) in the respective Contest Item.
18) Producers can only attain the 300% qualifying group once in this Contest under any circumstances.
19) Airport tax and security tax both in Hong Kong/Macau airport and airports of the trip destination are excluded. The required expenses for qualifiers will be debited from qualifiers' Company payroll account automatically after the trip.
20) For case applications submitted to AIA, Financial Planners are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorised vendor before the cut-off time.
21) Financial Planners should make product recommendation based on customer needs and affordability and should not make any award-driven recommendation to customers.
22) The contest results are subject to adjustments after the policy cooling-off period. AIA reserves the right to retract the rewards based on the adjusted ranking results and any substantiated violation of sales conduct.
23) Qualifiers must be in-force with AIA when the awards and recognitions are presented. The award and recognition are not transferrable and cannot be exchanged for cash.
24) AIA reserves the right to amend this Contest and the rewards at any time without prior notice. In case of any disputes, AIA reserves the right for any final decision.

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