友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)	From:	Winnie Fung
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Executives / IVS Executives / Contact Centre	Dept:	Corporate Solutions
Date:	01 October 2025	Total pages:	5
Subject:	**(A251022) 「友心意」醫療保障計劃 2 及「友愛護」癌症保障計劃 — 「特別投保安排」** **StepUp Medical Protection Plan 2 & Shield Up Cancer Protection Plan – "Special Enrolment Arrangement"**		

好消息！「友心意」醫療保障計劃 2（「友心意 2」）及「友愛護」癌症保障計劃（「友愛護」）「特別投保安排」現推出新一輪推廣期（2025 年 10 月 1 日至 2025 年 12 月 31 日）。機會難逢，立即把握 IVS 銷售良機！

「友心意2」「特別投保安排」最新推廣詳情如下：

推廣期：	**2025 年 10 月 1 日**至 **2025 年 12 月 31 日**
合資格客戶：	AIA 團體**醫療**保險計劃成員 （AIA 團體醫療保險計劃並不包括自選或附加保障之計劃，以及擁有 AIA 團體醫療保險計劃的公司須於投保及 / 或最新保單週年日時擁有 8 名或以上全職僱員）
優惠內容：	合資格成員在推廣期內可： **1) 隨時投保^「友心意 2」，毋須醫療核保，並享有首年 9 折保費優惠***； **2) 成功投保，更可得「友心意全程賞」#，獲取2張500港元/澳門幣電子保費現金券（總值1,000港元/澳門幣）** ^ 毋須於以下指定時段內投保：i) 新入職僱員及其家屬：於他們的 AIA 團體醫療保險計劃之保障生效日起 60 日內；或 ii) 現有僱員及其家屬：於 AIA團體醫療保險計劃的「保單周年日」起的 60 日內。 * 優惠受有關條款及細則約束，詳情請參閱產品簡介。**營業員必須持有卷二 [一般保險] 牌照**（只適用於香港營業員）**及已完成「友心意」醫療保障計劃 2 產品線上學習課程及內部牌照評測**（路徑：iAcademy > 網上學習 > 內部牌照 > 企業業務產品 >「友心意」醫療保障計劃 2 產品線上學習課程及內部牌照評測）。 # 有關「友心意全程賞」推廣活動，請參閱通告A250329。
推廣範本：	**最新「友心意 2」推廣電郵範本及宣傳海報範本已上載至營業員專頁**，以供營業同事隨時下載並分享給僱主 / 人力資源部，讓其轉發給僱員，**掌握最新客戶優惠**。 路徑： eAC > 部門資訊 > 企業業務部 > 僱員福利友邦業務代表專區 > 營業員活動概覽 > 營銷推廣 > Worksite Marketing > Worksite Marketing 推廣工具 1) **「友心意 2」推廣電郵範本—人力資源部版本**（按此查看） 2) **「友心意 2」推廣電郵範本—僱員版本**（按此查看） 3) **「友心意 2」宣傳海報範本**（按此查看）
成員 AIA+網上投保步驟：	詳情請按此參閱
營業員 iPoS 填表步驟：	詳情請按此參閱

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「友愛護」「特別投保安排」最新推廣詳情如下：

推廣期：	2025 年 10 月 1 日至 2025 年 12 月 31 日
合資格客戶：	1) AIA 團體保險計劃僱員成員及 / 或; 2) AIA 強積金計劃 [1] / 職業退休計劃 [2] / 澳門退休金計劃僱員成員 [2] 及 / 或; 3) AIA 強積金 / 退休金個人計劃成員 [3-6] 包括： - AIA 強積金個人賬戶計劃 - AIA 強積金退休樂計劃 - AIA 強積金可扣稅自願性供款計劃 - 自僱人士 - 澳門友邦保險非強制性中央公積金個人計劃 1. 只適用於香港 2. 只適用於澳門 3. 只適用於2025 年 9 月 30 日或之前成為友邦強積金 / 退休金個人計劃成員之客戶 4. 友愛護之服務營業員必須為強積金 / 退休金個人賬戶之服務營業員 5. 如成員需要於投保「友愛護」前轉換服務營業員，請遞交「專屬顧問之委任信」 6. 如成員於AIA+（只適用於香港）或指定二維碼 / 連結投保，該個案將會被計入團體保險計劃之服務營業員之個案
推廣範本：	**最新「友愛護」推廣電郵範本已上載至營業員專頁**，以供營業同事隨時下載並分享給僱主 / 人力資源部，讓其轉發給僱員，**掌握最新客戶優惠**。 **只適用於團體保險成員**： 路徑： eAC > 部門資訊 > 企業業務部> 僱員福利友邦業務代表專區 > 營業員活動概覽 > 營銷推廣 > Worksite Marketing > Worksite Marketing 推廣工具 1) **「友愛護」推廣電郵範本—人力資源部版本**（按此查看） 2) **「友愛護」推廣電郵範本—僱員版本**（按此查看） **只適用於退休金成員**： 路徑： eAC > 相關鏈接 > MPF > 工具 > 常用資訊 1) **「友愛護」推廣電郵範本—人力資源部版本**（按此查看） 2) **「友愛護」推廣電郵範本—僱員版本**（按此查看） 營業員**必須已完成「友愛護」癌症保障計劃線上學習及內部牌照評測**（路徑：iAcademy > 網上學習 > 內部牌照 > 企業業務產品 > 「友愛護」癌症保障計劃線上學習及內部牌照評測）
成員 AIA+網上投保步驟：	詳情請按此參閱
營業員 iPoS 填表步驟：	詳情請按此參閱

最新**「友愛護」X「 友心意 2」推廣電郵範本**亦上載至營業員專頁，以供營業同事隨時下載並分享給僱主 / 人力資源部，讓其轉發給僱員。

路徑： eAC > 部門資訊 > 企業業務部 > 僱員福利友邦業務代表專區 > 營業員活動概覽 > 營銷推廣 > Worksite Marketing > Worksite Marketing 推廣工具

1) **「友愛護」X「 友心意 2」推廣電郵範本—人力資源部版本**（按此查看）
2) **「友愛護」X「 友心意 2」推廣電郵範本—僱員版本**（按此查看）

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。

祝 業務蒸蒸日上！

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Good News! "Special Enrolment Arrangement" of **StepUp Medical Protection Plan 2 ("StepUp 2")** and **Shield Up Cancer Protection Plan ("Shield Up")** are now launching a new round of **promotion period (1 October 2025 to 31 December 2025)**. This opportunity is too good to miss! Seize the IVS sales opportunities now!

Latest Promotion Details of **"StepUp 2" "Special Enrolment Arrangement"** are as follows:

Promotion Period:	1 October 2025 to 31 December 2025
Eligible Customers:	Members under an AIA group **medical** insurance scheme (AIA group medical insurance scheme does not include voluntary or top-up policies and the company with the AIA group medical insurance scheme is required to have a minimum of 8 full-time employees at policy application and/or on the latest policy anniversary date)
Offer details:	During the promotion period, Eligible members can: 1) Enrol "StepUp 2" at any time^ during the promotion period **without the requirement of medical underwriting and enjoy a 10% premium discount*** for the first year 2) Receive 2 HK$/MOP 500 ePremium Coupons (with a total value of HK$/MOP 1,000) in "Delight You Always" Promotion Campaign# after successfully enrolling it. ^ Not required to apply during the following designated periods: i) New join employees and their dependents: Within 60 days after their coverage effective date of an AIA group medical insurance scheme; or ii) Existing employees and their dependents: Within 60 days after the policy anniversary of an AIA group medical insurance scheme. * The offer is subject to relevant terms and conditions, please refer to the product brochure for details. **Financial Planners must hold Paper 2 [General insurance] Licence** (Applicable to Hong Kong Financial Planners Only) **and have completed the StepUp Medical Protection Plan 2 Online Training and Internal License Test** (Path: iAcademy > eLearning Training > Internal License > Corporate Solutions Product > StepUp Medical Protection Plan 2 Online Training and Internal License Test). # For the details of "Delight You Always" Promotion Campaign, please refer to memo A250329.
Promotion Templates:	**The latest "StepUp 2" Promotion Email Templates and Poster Template have been uploaded to eAC** for you to download at any time and share them with employers or Human Resources Departments so that they can forward it to employees **to keep abreast of the latest customer offers**. Path: eAC > Departments > Corporate Solutions > Employee Benefits Representative's Corner > Agency Activities > Marketing > Worksite Marketing > Worksite Marketing Tool 1) **"StepUp 2" Promotion Email Template – HR Version** (Click here to view) 2) **"StepUp 2" Promotion Email Template – Employee Version** (Click here to view) 3) **"StepUp 2" Promotion Poster Template** (Click here to view)
Member Online Application Flow:	Please click here to view the details
Financial Planner iPoS Form Filling Steps:	Please click here to view the details

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Latest Promotion Details of "Shield Up" "Special Enrolment Arrangement" are as follows:

Promotion Period:	1 October 2025 to 31 December 2025
Eligible Customers:	1) AIA group insurance scheme employee members and /or; 2) AIA MPF[1] / ORSO[2] / Macau pension scheme[2] employee members and /or; 3) AIA MPF / Pension Personal Account Members[3-6] Including: - AIA MPF Personal Account Programme - AIA MPF Happy Retirement Savings Programme - AIA MPF Tax Deductible Voluntary Contribution Programme - Self-employed Person - AIA Macau Non-Mandatory Central Provident Fund Individual Scheme 1. Only applicable to Hong Kong 2. Only applicable to Macau 3. Only applicable to customers who has become an AIA MPF / Pension Personal Account Members on or before 30 September 2025 4. The servicing agent(s) of Shield Up must be same as the servicing agent(s) of MPF / Pension Account 5. If member needs to change their servicing agent(s) before applying Shield Up, please submit "Letter of Appointment of Exclusive Agent(s)" 6. If member applies Shield Up via AIA+ (Only applicable to Hong Kong) or specified QR code / URL, the case will be assigned the servicing agent(s) of group insurance scheme
Promotion Templates:	The latest "Shield Up" Promotion Email Templates have been uploaded to eAC for you to download at any time and share them with employers or Human Resources Departments so that they can forward it to employees to keep abreast of the latest customer offers*. **Only Applicable to Group Insurance Members**: Path: eAC > Departments > Corporate Solutions > Employee Benefits Representative's Corner > Agency Activities > Marketing > Worksite Marketing > Worksite Marketing Tool 1) "Shield Up" Promotion Email Template – HR Version (Click here to view) 2) "Shield Up" Promotion Email Template – Employee Version (Click here to view) **Only Applicable to Pension Members:** Path: eAC > Useful Links > MPF > Tools > Useful Information 1) "Shield Up" Promotion Email Template – HR Version (Click here to view) 2) "Shield Up" Promotion Email Template – Employee Version (Click here to view) Financial Planners **must have completed the Shield Up Cancer Protection Plan Online Training and Internal License Test** (Path: iAcademy > eLearning Training > Internal License > Corporate Solutions Product > Shield Up Cancer Protection Plan Online Training and Internal License Test)
Member Online Application Flow:	Please click here to view the details
Financial Planner iPoS Form Filling Steps:	Please click here to view the details

The latest "Shield Up" X "StepUp 2" Promotion Email Templates have also been uploaded to eAC for you to download at any time and share them with employers or Human Resources Departments so that they can forward it to employees.

Path: eAC > Departments > Corporate Solutions > Employee Benefits Representative's Corner > Agency Activities > Marketing > Worksite Marketing > Worksite Marketing Tool

1) "Shield Up" X "StepUp 2" Promotion Email Template – HR Version (Click here to view)
2) "Shield Up" X "StepUp 2" Promotion Email Template – Employee Version (Click here to view)

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

We wish you every success!

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Yours faithfully,



Winnie Fung
Head of Individual Voluntary Solutions
CS – Individual Voluntary Solutions

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