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

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong)	From:	Victor Man
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Agency Executives / IVS Executives	Dept:	Corporate Solutions
Date:	31 December 2025	Total pages:	2
Subject:	**(A251250) CS 一站式：轉移僱主強積金計劃 - 保險代理專屬獎賞** **CS All-in-One: Transfer Employer MPF Scheme - Agency Exclusive Incentive**		

好消息！為鼓勵營業同事積極拓展企業業務（CS）業務範疇，**並協助客戶同時成為團體保險及強積金客戶**，以全面體驗企業業務的全方位服務，現隆重推出**「CS 一站式：轉移僱主強積金計劃 - 保險代理專屬獎賞」**！

獎賞詳情如下：

推廣期	**2025 年 12 月 22 日至 2026 年 4 月 30 日**
參加資格	所有持有強積金附屬中介人牌照的營業同事
合資格業務	**強積金企業個案** [1,2,6]
合資格客戶	**現有團體保險客戶** [3,5]
競賽要求及獎賞 [4-5]	於推廣期內，營業同事成功為**現有團體保險客戶**[3,5] **完成合資格強積金企業個案**[1,2,6]，即可按該強積金企業個案[1,2,6]所呈報之計劃轉移成員數目，獲得**每位轉移成員 HK$200** 現金獎賞[4-5]。 營業同事可按**每宗強積金企業個案**[1,2,6]，獲得**最高 HK$50,000** 現金獎賞[4-5]！

一般規則及要求：

1. **合資格強積金企業個案**只計算每宗於推廣期內成功遞交之 P(E) 的表格申請至「積金易」平台，由其他受託人轉移新強積金資產至 AIA 企業業務部（CS）的為客戶處理的強積金僱主計劃（MPF）及職業退休計劃（ORSO），並須於 2026 年 6 月 30 日或之前由 CS 完成該資產轉移。
2. 於推廣期內，以同一香港商業登記證（BR）登記之賬戶，只計算為一宗強積金企業個案。
3. **合資格團體保險客戶**必須於推廣期內持有有效團體保險計劃，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）。該保單必須經由保險代理 / 保險經紀分銷渠道購買。
4. 所有獲獎者必須為合資格客戶之現有團體保險計劃及合資格強積金企業個案的保險服務代理。
5. **合資格團體保險客戶**以 2025 年 12 月 1 日之公司紀錄為準。若客戶於 2025 年 12 月 1 日或之後更換保險代理：
   - 如原有保險服務由**保險代理**提供：被委託的新保險代理**不符合**獎賞資格。
   - 如原有保險服務由**保險經紀**提供：相關獎賞將由被委託的新保險代理所獲得。
6. 如果合資格個案屬共同個案（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。獎賞將按比例平均分配。
7. 營業同事於從事退休金銷售及推廣活動，以及為有關退休金計劃提供意見時，必須遵守《註冊中介人操守要求指引》，並獲得客戶以書面及明示同意該註冊退休金中介人將就有關個案所獲得之金錢利益及 / 或非金錢利益。詳情請參閱通告 A240263。
8. 根據友邦保險個人資料收集聲明（PICS），有關友邦保險集團公司在提供任何強積金及公積金相關服務時收集的任何個人資料，該等個人資料只會用於推廣或營銷任何強積金及公積金產品或服務。強積金及公積金客戶的資料是分別用作提供相關強積金或公積金的服務。請注意（一）不應該向其他人士披露客戶的資料作非強積金或公積金職能用途；（二）不應該將客戶的資料用於交叉銷售任何強積金或公積金計劃以外的產品或服務。
9. 所有獲獎者必須於獎賞發放時仍與 AIA 保持有效合約關係。
10. AIA 保留就調整後之得獎結果及就任何違規銷售行為追討已發放獎賞之權利。
11. AIA 保留隨時修改本競賽規則或獎賞之權利，恕不另行通知。
12. 如有任何爭議，AIA保留最終決定權。

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聯絡。

祝 業務蒸蒸日上！

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。 "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

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Good News! To encourage all Financial Planners to actively expand the scope of Corporate Solutions (CS) business and **assist clients in becoming both Group Insurance and MPF clients**, and to fully experience CS's comprehensive services, Corporate Solutions (CS) is pleased to launch the **"CS All-in-One: Transfer Employer MPF Scheme - Agency Exclusive Incentive"**!

Promotion Period	**22 December 2025 – 30 April 2026**
Eligibility	All MPF Licensed Financial Planners
Eligible Business	**MPF Corporate Case[1,2,6]**
Eligible Clients	**Existing Group Insurance Client[3,5]**
Qualifying Criteria and Rewards[4-5]	During the Promotion Period, Financial Planners who successfully **achieve the eligible MPF Corporate Case[1,2,6] for existing Group Insurance client[3,5]** will receive a cash reward of **HK$200 per transfer member[4-5],** based on the no. of transfer members reported in the MPF Corporate Case[1,2,6]. Financial Planner can receive a **maximum** cash reward of **HK$50,000[4-5] for each MPF Corporate Case[1,2,6]**.

General Rules & Requirement:

1. **Qualified MPF Corporate Case** (Unique Identification - UID) will be counted for each MPF Corporate Account case with completed P(E) form is submitted to eMPF Platform within the Promotion Period, with Asset Taken Over ("ATO") from external trustees to MPF Employer Plan and ORSO Employer Plan and successfully settled by AIA Corporate Solutions on or before 30 June 2026.
2. During the promotion period, accounts registered with the same Hong Kong Business Registration Certificate (BR) will only be counted as one MPF corporate case.
3. **Eligible Group Insurance Client** must hold a valid group insurance plan during the promotion period tailor-made plans and packaged plans (excluding policy conversions, employee choice products, LAUGHING "Dental Protection Plan," Macau Happy Protection Plan, and additional coverage plans). The policy must be purchased through Agency Distribution / Broker Distribution channel.
4. The qualifier must be the servicing agent of the existing Group Insurance policy and the eligible MPF Corporate case of the eligible client.
5. **Eligible Group Insurance Client** is based on company records as of December 1, 2025. If the client has appointed another servicing agent on or after December 1, 2025:
   - If the insurance service was provided by **an insurance agent**: the newly appointed servicing agent will **NOT** be eligible for the rewards.
   - If the insurance service was provided by **an insurance broker**: the newly appointed servicing agent will be eligible for the rewards.
6. If the qualifying case is jointly closed by 2 producers, 0.5 case will be counted for each producer. Case count calculation will not be rounded-up.
7. When Financial Planners are conducting MPF sales and marketing activities and giving advice in relation to MPF schemes, you must comply with the "Guidelines on Conduct Requirements for Registered Intermediaries" and obtain the customer's written and express consent to the monetary and/or non-monetary benefits to be received by the registered MPF intermediary in respect of the relevant cases. For details, please refer to memo A240263.
8. According to AIA Personal Information Collection Statement (PICS), in relation to any personal data collected by AIA whilst providing any services in respect of our mandatory provident fund schemes (MPF") and occupational retirement schemes ("ORSO"), such personal data would only be used for promoting or marketing any MPF and / or ORSO products or services. Such information obtained is used for performing MPF and / or ORSO functions. Please note that you (a) must not disclose such information to any other person for performing non-MPF and / or non-ORSO functions; (b) must not cross-selling non-MPF and / or non-ORSO products or services by accessing such information.
9. The qualifier must be in-force with AIA in order to enjoy the rewards.
10. AIA reserves the right to retract the rewards awarded in respect of the adjusted results of final sales report and for any sales violations.
11. AIA reserves the right to amend the rules or rewards of this promotion at any time without prior notice.
12. In case of any disputes, AIA reserves the right for any final decision.

If you have any questions, please contact your designated business development executives.

We wish you every success!

Your faithfully,

Victor Man
Head of CS Business Development
Agency Distribution, Corporate Solutions

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