**AIA Hong Kong**
Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333

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# Memo

| | | | | | |
|---|---|---|---|---|---|
| Attn | : | All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only) | Dept: | : | Premier MDRT Development Department |
| Copy | : | Mr. Alger Fung/ Ms. Amy Chan/ All Department Heads / ABDD Executives | Total Page | : | 9 |
| Date | : | 2 January 2026 | | | |
| Subject : | | **(A260115) 友邦峻宇財富管理中心將於2026年2月喬遷至友邦金融中心 (AIA Central) 以及 新增全新預約服務 - 33/F AIA Central 行政午餐**<br>**Notification of AIA Alta Wealth Management Centre relocation to AIA Central in February 2026 &**<br>**New Services - AIA Alta Executive Lunch at 33/F AIA Central** | | | |

為全面升級支援財務策劃顧問提升高淨值客戶享有更佳服務體驗，現有友邦峻宇財富管理中心將於2026年2月20日(大年初四)喬遷至友邦金融中心(AIA Central)*。我們將繼續提供現有專業範疇服務，並新增全新預約服務 - 33/F AIA Central行政午餐。*註: 友邦峻宇財富管理中心於中環友邦金融中心11樓**最早**會面日期為2026年2月20日。友邦峻宇財富管理中心於銅鑼灣希慎廣場29樓之**最後**會面日期為2026年2月16日。

全新「友邦峻宇財富管理中心」，位於中環友邦金融中心，佔地8,000呎，盡覽維港景色，毗鄰友邦保險呈獻香港摩天輪及AIA Vitality公園。中心內增設友邦保險歷史牆，向高淨值客戶展示出友邦保險百年的發展里程。公司踐行目標，務求為所有持份者創造價值，同時將環境、社會及管治理念融入業務，中心內的部分傢俬更選用環保物料。

**<u>「友邦峻宇財富管理中心」簡介</u>**

| | | |
|---|---|---|
| 地址 | : | 香港中環干諾道中**1**號友邦金融中心**11**樓**1101-06**室 |
| 日期 | : | 2026年2月20日(星期五) |
| 開放時間 | : | 星期一至五上午9 時至下午6時30分；星期六上午9時至下午2時 |
| 服務對象 | : | 香港區域之區域總監、合資格財務策劃顧問及高淨值客戶 |

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為使選用中心會客室之財務策劃顧問向高端客戶提供更佳完善服務體驗，財務策劃顧問可於 iBooking System (iBS) 預約會客室服務及新增全新33/F AIA Central行政午餐服務。

**「友邦峻宇財富管理中心」現有專業範疇服務**

| **專業範疇服務** | **服務方式** |
|---|---|
| 財富規劃及傳承諮詢服務<br>全面產品方案/保費融資/CIES | 適用於 2 個工作天前或以上之預約。<br><br>財務策劃顧問可於 iBS 進行預約，揀選適用之服務。預約一經確認，專責團隊將盡快與財務策劃顧問了解客戶需要以跟進，更會夥拍國際機構為有需要客戶以轉介形式提供服務。 |
| 售前核保咨詢 | 適用於 2 個工作天前或以上之預約。<br><br>財務策劃顧問可於 iBS 進行預約，揀選此項服務。預約一經確認，專責同事將盡快與財務策劃顧問了解客戶需要並跟進。 |
| 售後優先核保 | 適用於中心內遞交之新保單申請。<br><br>財務策劃顧問與高淨值客戶於中心會面後，將新保單號碼即場提供給中心同事或24小時內自行於iBS填寫於中心內遞交之新保單號碼，專責同事將優先處理核保。 |
| 售後核保查詢 | 適用於 2 個工作天前或以上之預約及中心內遞交之新保單申請。<br><br>財務策劃顧問與高淨值客戶於中心會面後，將新保單號碼即場提供給中心同事或24小時內自行於iBS填寫於中心內遞交之新保單號碼，以便核保部同事跟進售後核保查詢。<br>當核保跟進事項發出後，可於iBS選取會面當日預約記錄，點選<請求回電>(只限14天內)，核保部同事將會回電給相關同事，讓保單批核的過程更快更暢順。 |
| 東亞銀行開戶服務 | 預約適用於 7 個工作天前或以上。<br><br>iBS 預約一經確認，電郵資料到 aia_wm_ctr@aia.com 專責同事將盡快與財務策劃顧問了解，以便安排與東亞銀行分行同事到臨。 |
| 33/F AIA Central 行政午餐 | 預約適用於 4 個工作天前或以上。<br><br>財務策劃顧問可於 iBS 進行預約，揀選適用之服務。預約一經確認，33/F AIA Central 行政午餐服務**每日限量供應，只適用於預約上午 9 時會客室之客戶。**註:行政午餐服務最早用膳日期為 2026 年 2 月 20 日。<br><br>行政午餐費用將會全數在財務策劃顧問之發薪戶口內扣除。另外，如須取消行政午餐預約或有任何更改，必須於到訪日期前至少 4 個工作天完成。倘若在 4 個工作天內取消或更改行政午餐預約，費用仍會全數在財務策劃顧問之發薪戶口內扣除，不作另外通知 |

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**「友邦峻宇財富管理中心」區域客戶講座/活動租用場地安排**

| **客戶講座/活動租用場地時段** | **收費** |
|---|---|
| 星期一至五(不包括公眾假期)<br>下午3時至6時<br>晚上6時至9時 | HK$15,000/每時段 |
| 星期六(不包括公眾假期)<br>下午12時至3時<br>下午3時至6時 | HK$20,000/每時段 |

| **贊助費*** | **要求 (客戶講座/活動舉行後90天內達成以下一項)** | |
|---|---|---|
| | 1. 於中心遞交及繕發<br>新保單年度化保費(ANP)^保單#<br>**不少於US$200,000**<br>及<br>2.使用友邦峻宇財富管理中心會客室會見客戶次數達到 | 於中心遞交及繕發<br>新保單年度化保費(ANP)^保單#數目達到 |
| 100%贊助 | **20次或以上** | **6張或以上** |
| 50%贊助 | **10次或以上** | **3張或以上** |

*若無法達成贊助要求, 費用將從申請者發薪戶口內扣除。
^年度化保費(ANP)^保單指的是一次性繳付保費達 100 萬美元或年繳保費達 10 萬美元
#相關保單必須在友邦峻宇財富管理中心提交及繕發

我們期待於全新友邦峻宇財富管理中心為選用中心會客室之財務策劃顧問及其高淨值客戶提供更優質的服務，感謝大家對友邦峻宇財富管理中心的支持。

財務策劃顧問可於iBooking System (iBS) 先行預約服務(iBS 可網上預約21天內的服務)。

如有任何查詢，請電郵至友邦峻宇財富管理中心 aia_wm_ctr@aia.com。

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附錄一:

**「友邦峻宇財富管理中心」區域客戶講座/活動租用場地條款**

**<u>場地提供</u>**

-數碼螢幕(1 個 HDMI 輸出)

-120 seats

-3 組手持式麥克風

-場地清潔

<u>備註:</u>

-只作客戶講座/活動用途，最多 120 名參與者。

-中心僅提供樽裝水

-禁止攜帶外食、酒精或飲料

-如場地出現任何損毀或髒亂情況，中心將收取 HK$1,000 清潔費。

-區域需自行安排活動後勤，包括攝影、宣傳、報名與註冊、嘉賓講者、司儀、簡報設備(如筆電)及資料等 。

**<u>餐飲安排</u>**

-如需安排餐飲，可向 33/F AIA Central 訂購，費用將相應從申請者發薪戶口內扣除(中心不允許攜帶外來食物或飲品)。

–若活動當日安排任何食物，中心將額外收取 HK$1,500 的附加費。此 HK$1,500 的附加費不作任何贊助，並將從申請者發薪戶口內扣除。

-如有任何查詢，請與友邦峻宇財富管理中心主管聯絡。

**<u>取消/更改費用</u>**

-如需取消或更改，請發電子郵件到 aia_wm_ctr@aia.com。

-如活動前五個工作日內取消，將收取 HK$3,000 元費用。

如有任何查詢，請電郵至友邦峻宇財富管理中心 aia_wm_ctr@aia.com。

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# Memo

To enhance support our Financial Planners to develop high-net-worth customer market, we are pleased to announce AIA Alta Wealth Management Center* will be relocated to AIA Central on 20 February 2026. We are also glad to announce new booking service will be launched - AIA Alta Executive Lunch at 33/F AIA Central. *Remarks: The 1st opening date at 11/F AIA Central is on 20 February 2026 (Friday) & the last opening date at 29/F Hysan Place is on 16 February 2026 (Monday).

The brand-new AIA Alta Wealth Management Centre at 11/F AIA Central with 8,000 feet and best view of Victoria Harbor. It is adjacent to Hong Kong Observation Wheel & AIA Vitality Park. Beyond 100 years history of AIA is presented with artifacts and videos at centre. According to company ESG strategy, part of the furniture in the center made from eco-friendly materials.

## Introduction of AIA Alta Wealth Management Center

| | | |
|---|---|---|
| Address | : | Suites 1101-6, AIA Central, 1 Connaught Road Central, Hong Kong |
| Start Date | : | 20 February 2026 |
| Opening Hours | : | Monday to Friday 9AM-6:30PM<br>Saturday 9AM – 2PM |
| Target Audience | : | District Director and eligible financial planners of Hong Kong Region, High-net-worth customers |

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To enable our Financial Planners to provide a better and comprehensive service experience to high-net-worth customers. Financial Planners can book meeting room services with the new AIA Alta Executive Lunch service** at 33/F AIA Central via the iBooking System (iBS). (AIA Alta Executive lunch is limited daily and only apply to meeting room booking at 9AM.)

** Note: The 1st enjoying date of executive lunch is on 20 February 2026.

The cost of the executive lunch will be fully deducted from the Financial Planners' payroll account. In addition, any cancellation or changes to the AIA Alta Executive lunch booking must be made at least 4 working days before the visit date. If the booking is canceled or changed within 4 working days, the cost will still be fully deducted from the Financial Planners' payroll account without further notice.

**Professional services provided in AIA Alta Wealth Management Centre**

| **Professional services** | **Service Model** |
|---|---|
| Wealth and Legacy Planning Advisory Service | Applicable for reservations **≥ 2 working days**<br><br>Financial Planner can choose the applicable service when making a booking in iBS. Once the booking is confirmed, the dedicated team will contact the financial planner at the soonest to follow up. Referral services will be provided by international frim upon understanding customers' needs.<br><br>Referral services are inclusive of:<br>- Trust advisory and setup services<br>- Tax and legal advisory services<br>- Family office advisory and setup services |
| Total Product Solution/ Premium Financing/ CIES | |
| Pre-sales Underwriting Enquiry | Applicable for reservations **≥ 2 working days**<br><br>Financial Planner can choose the applicable service when making a booking in iBS. Once the booking is confirmed, the dedicated team will contact the financial planner at the soonest to follow up. |
| Priority Underwriting | Applicable to **new policy that is submitted in Centre**.<br><br>For new policy that is submitted in centre, Financial Planner can pass the newly submitted policy number to centre team or input the newly submitted policy number in iBS within 24 hours after booking. Dedicated team will follow up the soonest to provide priority underwriting service. |
| Post-sales Underwriting Enquiry | Applicable for reservations **≥ 2 working days & new policy that is submitted in Centre**.<br><br>After meeting with high-net-worth clients at the center, Financial Planner can pass the newly submitted policy number to centre team or input the newly submitted policy number in iBS within 24 hours after booking. Dedicated team will follow up at soonest.<br><br>After the pending requirement is issued, Financial Planners can retrieve the appointment record in iBS, choose "Request Callback" (within 14 days only). Dedicated team will call back at soonest. |

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| **Professional services** | **Service Model** |
|---|---|
| Bank of East Asia Account Opening Service | Applicable for reservations **≥ 7 working days**<br><br>After booking confirmed in iBS, sending email to AIA Alta Wealth Management Centre - aia_wm_ctr@aia.com with Bank of East Asia Account Opening Service request. The dedicated team will contact the financial planner at the soonest to follow up. |
| AIA Alta Executive Lunch service at 33/F AIA Central | Applicable for reservations **≥ 4 working days**<br><br>Financial Planner can choose the applicable service when making a booking in iBS. AIA Alta Executive lunch** is limited daily and only apply to meeting room booking at 9AM. **Note: The earliest date of executive lunch is on 20 February 2026.<br><br>The cost of the executive lunch will be fully deducted from the Financial Planners' payroll account. In addition, any cancellation or changes to the AIA Alta Executive lunch booking must be made at least 4 working days before the visit date. If the booking is canceled or changed within 4 working days, the cost will still be fully deducted from the Financial Planners' payroll account without further notice. |

**Arrangement of Client Seminar/Event at AIA Alta Wealth Management Centre**

| **Venue Booking Fee** | **Service Fee** |
|---|---|
| Monday to Friday (Exclude Public Holiday)<br>3PM to 6PM<br>6PM to 9PM | HK$15,000/per session |
| Saturday (Exclude Public Holiday)<br>12PM to 3PM<br>3PM to 6PM | HK$20,000/per session |

| **Sponsorship*** | **Requirement**<br>**(either achieved 1 of the below within 90 days after the event held)** | |
|---|---|---|
| | 1.Total Amount of HNW ANP^ policy# submitted & delivered **not less than US$200,000**<br>&<br>2.Number of meeting held in Alta Wealth Management Centre | Number of HNW ANP^ policy# submitted & delivered |
| 100% Sponsorship | **20 times or above** | **6 policies or above** |
| 50% Sponsorship | **10 times or above** | **3 policies or above** |

*Please note if the number of meeting / onsite submitted policy does not meet the sponsorship requirement, the booking fee will be deducted from applicant's commission statement accordingly.
^HNW ANP refer to Single Pay Premium: USD 1 million equivalent or Regular Pay Premium: USD100,000 equivalent
#Policy to be submitted in AIA Alta Wealth Management Centre

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For inquiries, please contact AIA Alta Wealth Management Centre aia_wm_ctr@aia.com.

Best Regards,



Donna Cheung
Premier MDRT Development Department
DC/kl/cc

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**Appendix 1-**

**Rules of Client Seminar/Event at AIA Alta Wealth Management Centre**

**Package include:**

-Digital Wall (with 1 x HDMI)

-120 seats

-3 sets of handheld MIC

-Venue Cleaning

Remarks:
-For Client Seminar only, max 120 participants.

-Only bottles of water will be provided by Centre.

-No outside food / alcohol / drinks allowed.

-Cleaning fee HK$1,000 will be charged for food/beverage spills or dirt.

-Organizer responsible for other event logistics including photography, promotion, enrolment & registration, guest speaker, MC, presentation equipment (ie: laptop) and material, etc.

**Food arrangement**

-You can order foods from 33/F AIA Central and cost will be deducted from applicant's commission statement accordingly if any catering service need (No outside food or drinks allowed).

- An extra HK$1,500 surcharge will be charged if any food served. The extra HK$1,500 surcharge is not sponsorable and will be deducted from applicant's commission statement accordingly.

-For details, please contact centre-in-charge.

**Cancellation Fee**

-Please make cancellation via e-mail to aia_wm_ctr@aia.com.

-Cancellation within 5 working days of the event will be charged HK$3,000.

For inquiries, please contact AIA Alta Wealth Management Centre aia_wm_ctr@aia.com.

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