**友邦香港**
香港北角電氣道 183 號
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**AIA Hong Kong**
12/F, AIA Tower
183 Electric Road
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| | | | |
|---|---|---|---|
| Attn: | All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong) | From: | Victor Man |
| 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: | 2 January 2026 | Total pages: | 4 |
| Subject: | **(A260149) 2026 年第 1 季 AIA 強積金個人個案客戶推廣**<br>**2026 Q1 AIA MPF PA Customer Offer** | | |

**好消息！**為支持各營業員於 AIA MPF 加入積金易平台後繼續衝刺，企業業務隆重推出**「2026 第 1 季 AIA 強積金個人個案客戶推廣」**！**合資格強積金個人賬戶計劃[1]成員**最高可獲雙重優惠[3] 高達 **HK$18,888**！轉入資產越多，紅利越豐厚！請即行動，解鎖潛在客源！

**推廣詳情如下：**

| | |
|---|---|
| **推廣期** | **2026 年 1 月 1 日至 3 月 31 日** |
| **合資格業務** | **強積金個人個案** |
| **合資格計劃** | **「休悠樂」個人賬戶計劃（「休悠樂」）及 AIA 強積金可扣稅自願性供款計劃（「TVC」）** |
| **優惠內容** | **雙重優惠[3]：高達HK$18,888紅利**<br><br>**優惠一** (i),(ii),(iv)<br>全新及現有成員從第三方受託人轉入的新強積金資產，<br>可尊享一次性紅利（「紅利」），受細則限制。<br><br>**優惠二** (i),(iii),(iv)<br>成員將強積金賬戶連結至 AIA+ 並於積金智「邦」手完成風險評估測試，<br>可享額外紅利，受細則限制。 |

| **從第三方受託人轉入新強積金資產（港元）** | **一次性紅利（港元）** | | |
|---|---|---|---|
| | **優惠一** | **優惠二** | **一次性紅利總額** |
| | **基本紅利** | **額外紅利** | |
| 80,000 - 379,999 | 288 | 200 | 488 |
| 380,000 - 879,999 | 688 | 200 | 888 |
| 880,000 - 1,379,999 | 2,388 | 1,000 | 3,388 |
| 1,380,000 - 1,879,999 | 6,888 | 2,000 | 8,888 |
| 1,880,000 - 2,379,999 | 8,888 | 5,000 | 13,888 |
| 2,380,000 或以上 | 13,888 | 5,000 | **18,888** |

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**紅利計算及派發：**

i. 紅利將於 2027 年 4 月前按合資格成員的最新投資選擇派發。

ii. 紅利金額將按你於 2026 年 1 月 1 日至 3 月 31 日期間，從其他受託人轉入新強積金資產的總和計算。你需在 2026 年 1 月 1 日至 2027 年 4 月紅利派發日期間未曾作任何提款。

iii. 成員需在 2026 年 3 月 31 日前將強積金賬戶連結至 AIA+，並於積金智「邦」手完成風險評估測試。完成測試後，需確保測試畫面顯示下面的版面，以獲得額外紅利。




iv. 紅利將按成員於派發紅利當日最新的投資選擇，以單位 / 金額形式[4] 分配 / 存入到成員的賬戶。

**條款及細則:**

1. 成功參與「休悠樂」及「TVC」之成員，將受「休悠樂」及「TVC」詳載於申請表格內之有關條款及細則所約束。
2. 紅利只適用於在派發紅利當日未終止有關賬戶之成員，並在 2026 年期間未曾獲發任何一次性紅利之成員。
3. 此優惠不可與任何其他現存優惠同時享用。
4. 就保證組合以外之單位化強積金基金而言，有關紅利將以單位形式分配到你的賬戶。而就保證組合（一項非單位化基金）而言，有關紅利將以金額形式存入到你的賬戶。

**一般規則：**

- 財務策劃顧問必須持有有效的相關牌照，方可銷售推廣活動中的產品。
- 友邦保留隨時修改及闡釋本推廣活動規則之權利，恕不另行通知。
- 如有任何有關此優惠、條款及細則闡釋之爭議，友邦保險（國際）有限公司保留最終決定權。

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！

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Good News! To support all Financial Planners in driving continued performance following AIA MPF onboarding eMPF Platform, Corporate Solutions is delighted to launch the "2026 Q1 AIA MPF PA Customer Offer". Eligible MPF Personal Account Members are entitled to receive double offers of a maximum bonus up to HK$18,888! The higher transferred-in assets, the more bonus! Act now and unlock your potential customer base!

Offer details are as follows:

| | |
|---|---|
| Promotion Period | 1 January – 31 March 2026 |
| Qualifying Business | MPF Retail Case |
| Qualifying Plan | AIA MPF Personal Account Programme (MPFPA) and AIA MPF Tax Deductible Voluntary Contribution Programme (TVC) |
| Offers Details | **Double Offer[3]：Up to HK$18,888 Bonus**<br><br>Offer 1 (i),(ii),(iv)<br>New and existing eligible members' newly transferred-in MPF assets from a third-party trustee can enjoy a one-off bonus (the "Bonus"), subject to conditions.<br><br>Offer 2 (i),(iii),(iv)<br>Members link their MPF accounts to AIA+ and complete risk assessment in the MPF Smart Advisor can enjoy extra Bonus, subject to conditions. |

| Newly transferred-in MPF assets from a third-party trustee (HK$) | One-off Bonus (HK$) | | |
|---|---|---|---|
| | Offer 1 | Offer 2 | Total One-off Bonus |
| | Basic Bonus | Extra Bonus | |
| 80,000 - 379,999 | 288 | 200 | 488 |
| 380,000 - 879,999 | 688 | 200 | 888 |
| 880,000 - 1,379,999 | 2,388 | 1,000 | 3,388 |
| 1,380,000 - 1,879,999 | 6,888 | 2,000 | 8,888 |
| 1,880,000 - 2,379,999 | 8,888 | 5,000 | 13,888 |
| 2,380,000 or above | 13,888 | 5,000 | 18,888 |

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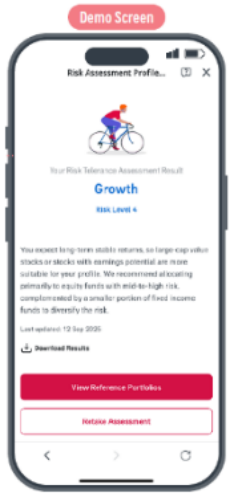
**Bonus calculation and distribution:**

i. The Bonus will be distributed by April 2027 per eligible member's latest investment mandate.
ii. The Bonus amount will be calculated based on your aggregated newly transferred-in MPF Asset from other trustees that are settled during 1 January - 31 March 2026. You must make no withdrawal during 1 January 2026 to the Bonus distribution date in April 2027.
iii. Members must link their MPF accounts to AIA+ and complete risk assessment in the MPF Smart Advisor by 31 March 2026. Upon completing the assessment, the screen must display the format below to be entitled to extra bonus.




iv. The Bonus will be allocated/credited to member's account in the form of a unit/amount rebate[4] and in accordance with his / her latest investment mandate as at the date of Bonus distribution.

**Terms and conditions:**

1. Upon successful enrolment into the MPFPA and TVC, a member is bound by all of the terms and conditions of the MPFPA and TVC as stated in the application form.
2. The Bonus are only applicable on the condition that your account has not been terminated on the date of Bonus distribution and has not received any bonus during 2026.
3. This offer is not valid in conjunction with any other pre-existing offer(s).
4. For MPF funds (other than the Guaranteed Portfolio), which are unitised funds, the Bonus will be allocated to your account in the form of units. For the Guaranteed Portfolio, which is not a unitised fund, the relevant amount of the Bonus will be credited to your account.

**General Rules:**

- Financial Planners must hold a valid relevant license to sell products in the promotion.
- AIA reserves all rights for amending and explaining the rules, terms and conditions of this promotion at any time without any prior notice.
- In case of any dispute in relation to these special privileges and the interpretations of the terms and conditions herein, AIA International Limited's decision shall be final.

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

Yours faithfully,

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

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