AIA Hong Kong

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Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong)

From: Joanne Ma
Head of Underwriting

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 8 Jan 2026

Total page: 2

Subject: (Ref: A260166) 延長提升保單遞交支援 – 資產或入息證明審核選項
Extension for Enhanced Support for Policy Submission – Asset & Income Proof Review Option

承接通告A251160，我們將延長下列核保部推廣活動至2026年3月31日。詳情如下：

詳情:

- 時間: 由即日起至2026年3月31日
- 只適用於在舊保單中已遞交有關證明文件，而相關證明文件必須符合以下條件，包括但不限於：
  - 該証明文件能支持現有及新保單的保費
  - 該証明文件的發出日期必須在合理的期限內
  - 財務策劃顧問需確定該証明文件依然有效，及申請人並沒有財務狀況轉變

備註： 《打擊洗錢及恐怖分子資金籌集指引》要求維持不變，核保部保留索取相關文件以處理申請的權利。

如有任何查詢，請於 iEngage/PES 使用 Chatbot 進行查詢。

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Further to Memo A251160, the following underwriting initiatives will be extended until 31 March 2026. Details as below:

Details:

- Period: Effective immediately until 31 March 2026
- Applicable only if the relevant proof documents were submitted for an existing policy and meet the following conditions, including but not limited to:
    - The proof document can support both the existing and new policy premiums
    - The proof document's issuance date must fall within a reasonable timeframe
    - The Financial Planning Consultant must ensure the document remains valid and that the applicant's financial situation has not changed

Note: Existing requirements under the *Guidelines on Anti-Money Laundering and Counter-Terrorist Financing* remain unchanged. Underwriting Department shall reserve the right to obtain relevant documents for proceeding the application.

Regards,



Joanne Ma

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