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

Attn:	EDDAs/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners	From:	Premier Agency Development Department
Co/Dept:	Mr. Alger Fung / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / Heads of Agency Division / ABDD - ABPs		
Date:	10 March 2026	Total Page:	5 pages

Subject: **(A260213) [更新] 2026 友邦領袖升途計劃**
[Update] 2026 AIA Agency Future Leader Programme

營業領袖是友邦持續發展營業團隊的堅實動力，亦是財務策劃顧問事業發展的重要里程。公司為全力支持有志成為未來領袖的營業同事能更快實踐目標，現推出全新「友邦領袖升途計劃」，旨在為各位的領袖才能增值、提高大家招募成功機會、並達到快速晉升成為經理行列。



有關計劃詳情請參閱下文。如有任何疑問，請聯絡閣下之營業拓展部或電郵至(aiahk.premieragency@aia.com) 與卓越營業發展部同事查詢。

We are pleased to launch “AIA Agency Future Leader Programme”. Please refer to the captioned memo for details. For inquiries, please contact respective ABDD or email to PAD (aiahk.premieragency@aia.com).

Best Regards,

Joel Lee
Head of Premier Agency Development
JL/ic/cc/al

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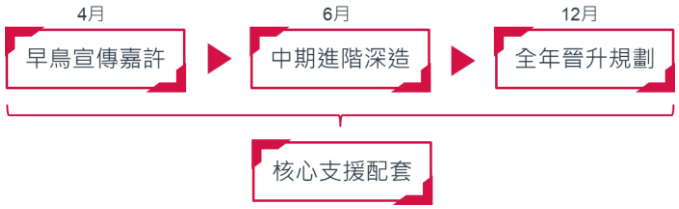
2026 友邦領袖升途計劃

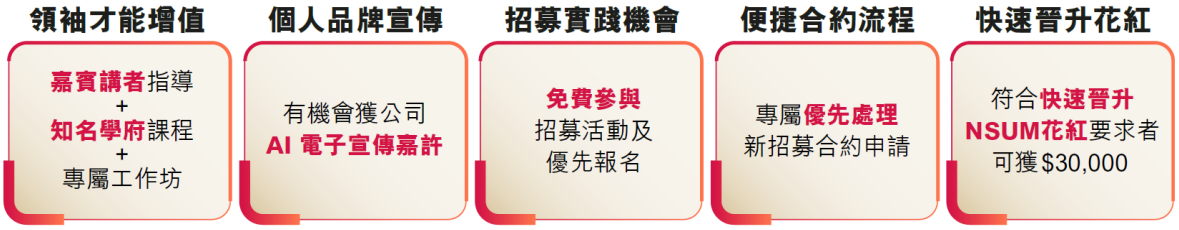
參加資格

1) 在職的財務策劃顧問(不包括截至 2026 年 1 月 31 日職銜為營業單位主管及曾任營業單位主管的人士)；及
2) 於 2026 年合約生效的新晉財務策劃顧問 (不包括新入職營業單位主管)

計劃內容藍圖



核心支援配套



早鳥宣傳嘉許

要求			獎賞
於 2026 年 1 月至 4 月期間			
1 位新招募 [i]	**及**	**個人 FYCS HK$80,000**	獲公司 **AI 電子宣傳嘉許**

中期進階深造

要求			獎賞
於 2026 年 1 月至 6 月期間			
1 位新招募 [i]	**及**	**個人 FYCS HK$80,000**	獲邀出席 **拔尖提升及交流會**

全年晉升規劃

要求					獎賞
於 2026 年 1 月至 6 月期間				於 2027 年 1 月或之前	
1 位新招募 [i]	**及**	**個人 FYCS 達到維持合約水平 (按比例計算)** [ii]	**及**	**完成所有 NSUM 的委任要求** [iii] **並成功晉升為 NSUM**	獲邀出席友邦集團舉辦 **2027 PALS 海外會議**

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備註

更新 Update

i. 新招募包括「友招募 iRecruit」內已正確紀錄的上述新招募，當中不包括財務策劃顧問實習生合約。但如財務策劃實習生在競賽日期內轉換為一般財務策劃顧問合約，則可被計算為此計劃的新招募。另外，新招募不包括新入職的營業單位主管。
   - 於新晉財務策劃顧問之「友招募 iRecruit」準招募資料中的「得悉空缺之來源」部份填寫招募者資料，此關係於合約生效後不可更改（只適用於香港）；或
   - 於新晉財務策劃顧問之「友招募 iRecruit 2.0」申請人資料中的「招聘顧問編號」填寫助理分區經理/分區經理編號（只適用於澳門）

ii. 維持合約的個人 FYCS 將按比例計算，須達到不少於 3 個月維持合約的 FYCS 水平(HK$32,000)

iii. 請參閱《報酬及福利手冊 – 適用於財務策劃顧問》– 資深分區經理（SUM）的委任要求。

一般規則

1. 所有獲獎者必須於獎賞發放時仍與 AIA 持有效合約。
2. 所有獎賞不可退換或轉換成以現金發放，安排均以 AIA 最終安排為準。
3. AIA 保留隨時修改競賽規則或獎賞之權利, 恕不另行通知。
4. 如有任何異議, 以 AIA 最後決定為準。

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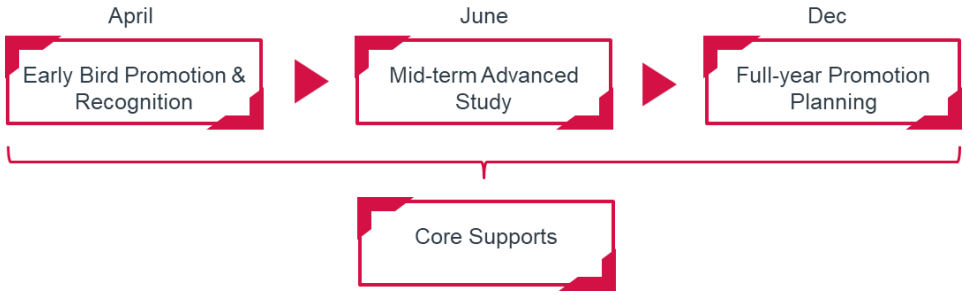
2026 AIA Agency Future Leader Programme

Eligibility

1) Inforce Financial Planners (excluding those with Agency Leader titles, or have ever had Agency Leader titles as of 31 January 2026); and
2) New Financial Planners contracted in 2026 (excluding new joined Agency Leaders)

Programme Content & Roadmap



Core Supports



Early Bird Promotion & Recognition

Requirement			Award
Within January to April 2026			
1 New Recruit [i]	**AND**	**Personal FYCS HK$80,000**	Receive Company's **AI-powered Digital Promotion & Recognition**

Mid-term Advanced Study

Requirement			Award
Within January to June 2026			
1 New Recruit [i]	**AND**	**Personal FYCS HK$80,000**	Being invited to attend **Elite Development & Exchange Seminar**

Full-year Promotion Planning

Requirement					Award
Within January to June 2026				In or before January 2027	
1 New Recruit [i]	**AND**	**Achieve Pro-rata Personal MOC FYCS Level** [ii]	**AND**	**Complete all NSUM appointment requirements** [ii] **& successfully be appointed as NSUM**	Being invited to attend **2027 PALS overseas convention** organized by AIA Group

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Remarks:

更新 Update

i. New Recruit(s) will include the above new recruit(s) properly recorded in "iRecruit". New Financial Planners who are under Internship contract will not be counted. If he / she is converted to normal agent within contest period, he / she can be counted as New Recruit for this programme. New recruit(s) who are New Leaders are excluded.
   - Fill in the recruiter information in the "Source of recruitment" in the Financial Planner's iRecruit's prospect details. This relationship cannot be amended after contract is effective (For Hong Kong Only); OR
   - Fill in the agent code of the AUM/UM under the "Recruiter Agent Code" in the Financial Planner's iRecruit 2.0 prospect details. (for Macau Only)

ii. The individual FYC Score for contract maintenance will be calculated on a pro-rata basis, and meet a minimum of 3 months pro-rata FYC Score requirement of contract maintenance (HK$32,000).

iii. Please refer to "Compensation and Benefits Manual – for Financial Planners"– Appointment of Agency Leaders – Senior Unit Manager (SUM).

General Rules & Regulations:

1. Awardees must hold valid agent/ financial planner contract with the Company at the time the awards are paid out / redeemed.
2. All privileges are not refundable, transferrable nor payable, program is subject to AIA's final decision.
3. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability at any time without prior notice.
4. In the event of dispute, AIA's decision is final and conclusive.

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