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Memo

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

From: Andrew Tang

Dept.: Proposition & Healthcare Strategy, Business Activation & Analytics

Copy: Mr. Alger Fung / Ms. Amy Chan / Ms. Alice Liang / Ms. Melissa Wong / Mr. Louie Ho / All Department Heads / Heads of Agency Division / BPs / Call Centre

Total pages: 3 pages

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Subject: A260222 **《退休天書》更新版正式推出 ：掌握「平安三寶」重點資訊**
Retirement Masterbook Updated Edition Now Available: Master "Three Instruments of Peace"

自《退休天書》推出以來反應熱烈，為進一步支援前線同事對銀髮族客戶議題的需要，現推出**《退休天書》更新版**。新增**「平安三寶」**重點內容（第19 至 22頁），協助大家以更貼近市場趨勢的話題，開啟策略性退休規劃對話。

「平安三寶」— 即遺囑、持久授權書及預設醫療指示 — 是與銀髮族客戶探討未來財務、醫療及照顧安排的關鍵切入點。大家可善用此工具開啟話題，主動出擊，將每一次客戶交流轉化為更深入的退休及保障規劃對話，把握商機，推動業務再創高峰！

《退休天書》更新版

2026年4月更新 **可分享予客戶**







按此瀏覽：繁體中文 | 簡體中文 [全新]

如欲查詢，請電郵至產品主張及醫療保健業務推展部 (P&H Business Activation) aiahk.proposition@aia.com。

《退休天書》重要注意事項: 當中的「退休密碼」人格測試結果不可用於推薦任何特定的產品或服務。

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請將以上訊息傳達予屬下的營業同事，多謝合作！

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Retirement Masterbook Updated Edition Now Available: Master "Three Instruments of Peace"

Following the overwhelming response to the Retirement Masterbook, we are pleased to introduce an **Updated Edition** with a new featured topic — **the "Three Instruments of Peace"** (P.19-22), to support financial planners in engaging silver-generation customers through timely and strategic retirement planning conversations.

The "Three Instruments of Peace" — a Will, an Enduring Power of Attorney, and an Advance Medical Directive — serve as an effective entry point for discussions around future financial, medical, and care arrangements. By leveraging this enriched sales enablement tool, you can lead an impactful dialogue and turn market trends into business success!

Retirement Masterbook Updated Edition

Updated in April 2026 Sharable with customers



View e-copy: Traditional Chinese | Simplified Chinese [New]

For inquiries, please email Proposition & Healthcare Business Activation (P&H Business Activation): aiahkproposition@aia.com

Best regards,

Andrew Tang
Head of Proposition & Healthcare Strategy, Business Activation & Analytics

Important Note for Retirement Masterbook: The personality test result must not be used for recommending any particular product or service.

You **MUST NOT** disseminate, distribute, or circulate this memo to any person or party outside of AIA. Before the product launch, you **MUST NOT** share any information related to the product launch— including but not limited to this document—with anyone outside of AIA. The "Retirement Code" personality test results in "Retirement Masterbook" should not be used to recommend any specific products or services.

Please convey this message to your team members. Thank you for your cooperation!

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財務策劃顧問可於**2026年4月30日**起登入Agency Corner、AIA Smart 、及 i 學院 （iAcademy）及iEngage瀏覽及下載助銷工具：

《退休天書》更新版

- Agency Corner > 部門資訊 > 產品創新發展及執行部 > 終身壽險及儲蓄壽險 > 環宇盈活儲蓄保險計劃 > 助銷配套
- Agency Corner > 部門資訊 > 產品創新發展及執行部 > 終身壽險及儲蓄壽險 > 盈御多元貨幣計劃3 > 助銷配套
- Agency Corner > 部門資訊 > 產品創新發展及執行部 > 終身壽險及儲蓄壽險 > AIA延期年金計劃2 > 助銷配套
- Agency Corner > 部門資訊 > 產品創新發展及執行部 > 終身壽險及儲蓄壽險 >「活然人生」保險計劃 > 助銷配套
- AIA Smart > 資源中心 > 產品資料庫 > 終身壽險及儲蓄壽險 > 環宇盈活儲蓄保險計劃> 助銷配套
- AIA Smart > 資源中心 > 產品資料庫 > 終身壽險及儲蓄壽險 >「盈御多元貨幣 計劃3」> 助銷配套
- AIA Smart > 資源中心 > 產品資料庫 > 終身壽險及儲蓄壽險 > AIA延期年金計劃2 > 助銷配套
- AIA Smart > 資源中心 > 產品資料庫 > 終身壽險及儲蓄壽險 >「活然人生」保險計劃 > 助銷配套
- i 學院 (iAcademy) > 網上學習課程 > 內部牌照 > 終身壽險及儲蓄壽險 > 環宇盈活儲蓄保險計劃線上學習及內部牌照評測
- i 學院 (iAcademy) > 網上學習課程 > 內部牌照 > 終身壽險及儲蓄壽險 > 「盈御多元貨幣計劃3」線上學習及內部牌照評測
- i 學院 (iAcademy) > 網上學習課程 > 內部牌照 > 終身壽險及儲蓄壽險 > AIA延期年金計劃 2線上學習及內部牌照評測
- i 學院 (iAcademy) > 網上學習課程 > 內部牌照 > 終身壽險及儲蓄壽險 >「活然人生」保險計劃線上學習及內部牌照評測

Starting from **30 April 2026**, the sale enablement tools will be available for view and download by financial planner at Agency Corner, AIA Smart, and iAcademy:

Retirement Masterbook Updated Edition

- Agency Corner > Departments > Product Innovation, Development & Delivery > Whole Life, Savings & Endowment > GlobalFlexi Savings Insurance Plan > Sales Enablement
- Agency Corner > Departments > Product Innovation, Development & Delivery > Whole Life, Savings & Endowment > Global Power Multi-Currency Plan 3 > Sales Enablement
- Agency Corner > Departments > Product Innovation, Development & Delivery > Whole life, Savings & Endowment > AIA Deferred Annuity Plan 2 > Sales Enablement
- Agency Corner > Departments > Product Innovation, Development & Delivery > Whole life, Savings & Endowment > ProsperLife Insurance Plan > Sales Enablement
- AIA Smart > Resource Centre > Product Library > Whole Life, Savings & Endowment > GlobalFlexi Savings Insurance Plan > Sales Enablement
- AIA Smart > Resource Centre > Product Library > Whole Life, Savings & Endowment > Global Power Multi-Currency Plan 3 > Sales Enablement
- AIA Smart > Resource Centre > Product Library > Whole Life, Savings & Endowment > AIA Deferred Annuity Plan 2 > Sales Enablement
- AIA Smart > Resource Centre > Product Library > Whole Life, Savings & Endowment > ProsperLife Insurance Plan > Sales Enablement
- iAcademy > E-Learning Training > Internal License > Whole Life, Savings & Endowment > GlobalFlexi Savings Insurance Plan Online Training and Product Internal License Test
- iAcademy > E-Learning Training > Internal License > Whole Life, Savings & Endowment > Global Power Multi-Currency Plan 3 Online Training and Product Internal License Test
- iAcademy > E-Learning Training > Internal License > Whole Life, Savings & Endowment > AIA Deferred Annuity Plan 2 Online Training and Product Internal License Test
- iAcademy > E-Learning Training > Internal License > Whole life, Savings & Endowment > ProsperLife Insurance Plan Online Training and Product Internal License Test