友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only)	From:	Victor Man
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Executives / IVS Executives	Dept:	Corporate Solutions
Date:	12 February 2026	Total pages:	4
Subject:	**(A260257) 2026 年「強積金業務齊起動慶祝午宴」挑戰賽** **2026 "MPF Business Activation Celebration Luncheon" Challenge**		

為鼓勵更多新入職營業同事拓展企業業務，尤其以強積金業務，企業業務（CS）現推出 **2026 年「強積金業務齊起動慶祝午宴」挑戰賽**！新登記強積金附屬中介人牌照的營業同事，成功於指定推廣期內**完成 3 宗以上合資格強積金個人個案**，即可**獲邀與直屬經理一同參與慶祝午宴**，於現場接受嘉許。

請把握機會擴展更多強積金業務機遇同時贏取更多獎賞！獎賞詳情如下：

<table>
<tr><td>推廣期</td><td>
<table>
<tr><th>獲得強積金附屬中介人牌照日期</th><th>指定推廣期</th></tr>
<tr><td>2026 年 1 月 1 日至 3 月 31 日</td><td>2026 年 4 月 1 日至 6 月 30 日</td></tr>
<tr><td>2026 年 4 月 1 日至 6 月 30 日</td><td>2026 年 7 月 1 日至 9 月 30 日</td></tr>
<tr><td>2026 年 7 月 1 日至 9 月 30 日</td><td>2026 年 10 月 1 日至 12 月 31 日</td></tr>
<tr><td>2026 年 10 月 1 日至 12 月 31 日</td><td>2027 年 1 月 1 日至 3 月 31 日</td></tr>
</table>
</td></tr>
<tr><td>參加資格</td><td>所有新登記強積金附屬中介人牌照，已與友邦簽訂入職合約，並於推廣期內完成指定培訓課程的營業同事</td></tr>
<tr><td>合資格業務</td><td>強積金個人個案 [1-4]</td></tr>
<tr><td>合資格計劃</td><td>「休悠樂」個人賬戶計劃（MPFPA）</td></tr>
<tr><td>獎賞</td><td>合資格營業同事成功於指定競賽期內完成 3 宗以上合資格強積金個人個案，即可獲邀與直屬經理一同參與於司徒拔道友邦總部舉行之慶祝午宴，於現場接受嘉許！</td></tr>
</table>

一般規則及要求：

1. 合資格強積金個人個案（Unique Identification - UID）只計算每宗於推廣期內成功遞交之 P(P) / P(M) / P(C) 的表格申請至「積金易」平台，由其他受託人轉移新強積金資產至 AIA 企業業務部（CS）的「休悠樂」個人賬戶計劃（MPFPA），由 CS 完成該資產轉移，並完成及遞交「強積金客戶聲明及同意書」之個案。
2. 於推廣期內，以同一香港身份證號碼（UID）登記之賬戶，只計算為一宗個人個案。
3. 如果合資格個案屬共同個案（即個案由 2 名營業同事共同完成），每名營業同事將獲計算 0.5 宗個案。且個案不會以四捨五入方式計算。獎賞將按比例平均分配。
4. 不包括成員離職後被自動轉為「保留賬戶」之個人賬戶。
5. 營業同事於從事退休金銷售及推廣活動，以及為有關退休金計劃提供意見時，必須遵守《註冊中介人操守要求指引》，並獲得客戶以書面及明示同意該註冊退休金中介人將就有關個案所獲得之金錢利益及 / 或非金錢利益。詳情請參閱通告 A240263。

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。 "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

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6. 根據友邦保險個人資料收集聲明（PICS），有關友邦保險集團公司在提供任何強積金及公積金相關服務時收集的任何個人資料，該等個人資料只會用於推廣或營銷任何強積金及公積金產品或服務。強積金及公積金客戶的資料是分別用作提供相關強積金或公積金的服務。請注意（一）不應該向其他人士披露客戶的資料作非強積金或公積金職能用途；（二）不應該將客戶的資料用於交叉銷售任何強積金或公積金計劃以外的產品或服務。
7. 所有獲獎者必須於獎賞發放時仍與 AIA 保持有效合約關係。
8. AIA 保留就調整後之得獎結果及就任何違規銷售行為追討已發放獎賞之權利。
9. AIA 保留隨時修改本推廣規則或獎賞之權利，恕不另行通知。
10. 如有任何爭議，AIA 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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To encourage new Financial Planners to expand their Corporate Solutions business, especially in MPF Business, Corporate Solutions (CS) is launching the 2026 "MPF Business Activation Celebration Luncheon" Challenge! New Financial Planners who register for an MPF license and successfully complete 3 or more eligible MPF PA cases during the designated promotion period will be invited to a celebratory luncheon with their direct manager to receive recognition!

Take this opportunity to expand your MPF business opportunities and win more rewards! Reward details are as follows:

<table>
<tr><td>Promotion Period</td><td>
<table>
<tr><th>Licensed Month</th><th>Designated Promotion Period</th></tr>
<tr><td>1 Jan – 31 Mar 2026</td><td>1 Apr – 30 Jun 2026</td></tr>
<tr><td>1 Apr – 30 Jun 2026</td><td>1 Jul – 30 Sep 2026</td></tr>
<tr><td>1 Jul – 30 Sep 2026</td><td>1 Oct – 31 Dec 2026</td></tr>
<tr><td>1 Oct – 31 Dec 2026</td><td>1 Jan – 31 Mar 2027</td></tr>
</table>
</td></tr>
<tr><td>Eligibility</td><td>All Financial Planners who newly registered as a MPF licensed intermediary, signed "Letter of Agreement" with AIA International Ltd & AIA Company (Trustee) Limited, and completed MPF mandatory training during promotion period</td></tr>
<tr><td>Qualifying Business</td><td>MPF Retail Cases[1-4]</td></tr>
<tr><td>Qualifying Plan</td><td>AIA MPF Personal Account ("MPFPA")</td></tr>
<tr><td>Rewards</td><td>Eligible Financial Planners who successfully complete 3 or more eligible MPF PA cases during the designated promotion period will be invited to a celebratory luncheon held at the AIA headquarters on Stubbs Road with their direct manager to receive recognition!</td></tr>
</table>

General Rules & Requirement:

1. **Qualified MPF Retail Cases (Unique Identification – UID)** will be counted for each MPF Personal Account case with completed P(P) / P(M) / P(C) form is submitted to eMPF Platform with Asset Taken Over ("ATO") from external trustees to AIA MPF Personal Account ("MPFPA"), successfully settled by AIA Corporate Solutions and completed and submitted the "MPF Customer Declaration and Consent Form" within the Promotion Period.
2. Excluding the Personal Accounts that are automatically converted to "Preserved Accounts" upon cessation of employment.
3. During the Contest Period, only one MPF Retail Case will be counted for each HKID number (UID) registered.
4. If the qualifying case is jointly closed by 2 Financial Planners, 0.5 case will be counted for each Financial Planner. Case count calculation will not be rounded-up.
5. When Financial Planners are conducting MPF sales and marketing activities and giving advice in relation to MPF schemes, you must comply with the "Guidelines on Conduct Requirements for Registered Intermediaries" and obtain the customer's written and express consent to the monetary and/or non-monetary benefits to be received by the registered MPF intermediary in respect of the relevant cases. For details, please refer to memo A240263.
6. According to AIA Personal Information Collection Statement (PICS), in relation to any personal data collected by AIA whilst providing any services in respect of our mandatory provident fund schemes (MPF") and occupational retirement schemes ("ORSO"), such personal data would only be used for promoting or marketing any MPF and / or ORSO products or services. Such information obtained is used for performing MPF and / or ORSO functions. Please note that you (a) must not disclose such information to any other person for performing non-MPF and / or non-ORSO functions; (b) must not cross-selling non-MPF and / or non-ORSO products or services by accessing such information.
7. Qualifiers must be in-force with AIA when the time when the rewards are offered.
8. AIA reserves the right to retract the rewards awarded in respect of the adjusted results of final sales report and for any sales violations.
9. AIA reserves the right to amend the rules or rewards of this promotion at any time without prior notice.
10. In case of any disputes, AIA reserves the right for any final decision.

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

We wish you every success!

Yours faithfully,



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

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