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Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong)	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:	05 March 2026	Total pages:	2

Subject: (A260319) **可扣稅自願性供款 (TVC) 銷售重點須知**
Key Points to Note for Tax-Deductible Voluntary Contributions (TVC) Sales

為協助財務策劃顧問能進一步把握**強積金業務發展機會**及**為稅季做好準備**，我們特別整理了**可扣稅自願性供款 (TVC) 銷售重點須知**，提供一系列資訊作為參考。

重點須知	項目
銷售注意事項 (詳情按此參閱附件)	• **需準備的銷售文件** - 主事及附屬中介人資料 - 強積金中介人名片的格式 - 強積金計劃說明書 + 主要計劃資料文件 + 計劃單張 • **回贈及利益同意說明** - 禁止提供未經 AIA 認可的回贈、禮品或優待 - 收取金錢利益及非金錢利益必先取得客戶的書面及明示同意 • **解釋項目** - 保證基金安排 - TVC 主要特點 - 預設投資策略 - 不可預測或推算成分基金未來表現 • **協助客戶完成開戶** - 協助客戶填寫申請表或積金易平台資料 - 協助客戶填寫申請表及「強積金客戶聲明及同意書」

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。

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To help Financial Planners further grasp the development of MPF business and prepare for the tax season, we have specially consolidated the key points to note for selling Tax-Deductible Voluntary Contributions (TVC) with a series of information.

Key Points to Note	Items
Sales Important Notes (Please click here to view the appendix for details)	• **Sales Documents to be Prepared** - Information About Principal Intermediary and Subsidiary Intermediary - MPF Intermediaries Business Card Format • **Rebate and Benefit Consent Instructions** - Prohibition of offering rebates, gifts, or incentives not authorized by AIA - Prior Written and Explicit Consent Must be Obtained from Customers Before • **Items for Explanation** - Guaranteed Fund Arrangements - TVC Features - Default Investment Strategy - Future Performance of Constituent Funds Must Not be Predicted or Projected • **Assisting Customers with Account Opening** - Assisting Customers with the Completion of Application Forms or eMPF Platform - Assisting Customers with the Completion of Application Forms and the "MPF Customer Declaration and Consent Form"

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

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

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