AIA Hong Kong
27/F Hopewell Centre,
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Memo

Attn.:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong only)	**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:**	2 pages + enclosure
Date:	10 March, 2026		

Subject: A260330

最新《財富管理 — 傳承篇》熱爆登場
The "Wealth Management – Legacy" is officially available!

保險不單只是提供保障及管理風險，部分產品更是極具彈性的財富傳承利器。透過保險，保單持有人能按其個人意願分配財富，在保障與傳承之間取得平衡。

有見市場對財富傳承需求的日益增長，我們精心製作**《財富管理 — 傳承篇》**，以全新視角拆解客戶在傳承規劃上的真實痛點，並以一系列貼地生活化個案了解保險產品及其額外增值服務如何在增值、分配與跨代傳承上帶來的優勢。此銷售工具書專為前線同事而設，讓您在客戶面前更快切入需求、更易講解複雜概念，並以更具說服力的方式呈現 AIA 的專業與實力，助你更有效開拓高淨值及跨代規劃商機。

此助銷工具將有效支持財富傳承資訊的推廣，並進一步拓展業務。請大家積極主動出擊，將每一次客戶交流轉化為傳承對話的突破口！

《財富管理 — 傳承篇》



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。

您**不能**向友邦以外的任何人士或一方傳播、分發或散佈此通告。

請將以上訊息傳達予屬下的營業同事，多謝合作！

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Insurance is more than just a means of protection and risk management; it is also a flexible legacy planning tool. Through insurance, policy owners can distribute their wealth according to their personal wishes, achieving a perfect balance between protection and inheritance.

In view of increasing demand for wealth legacy planning in the market, we have produced "Wealth Management – Legacy", a sales tool which illustrates the pain points that customers may face in legacy planning from a different perspective. Through a series of relatable case studies, this sales tool demonstrates the advantages of insurance solutions in wealth accumulation, distribution and multi-generational inheritance. Tailor-made for frontline colleagues, this sales tool helps you identify customers' needs more quickly, explain concepts more easily, and present AIA's expertise and strengths more persuasively. We hope this sales enablement tool will assist you in effectively capturing opportunities in high-net-worth and intergenerational planning.

This sales enablement tool will effectively support you in promoting wealth legacy-related information and driving business opportunities. We encourage all of you to take proactive action and turn every customer interaction into a breakthrough conversation.

Wealth Management – Legacy



(Available in Traditional Chinese & Simplfied Chinese only)

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

Best regards,

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

You **MUST NOT** disseminate, distribute, or circulate this memo to any person or party outside of AIA.

Please convey the above message to your downline agents. Thank you for your attention.

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附件

《財富管理 — 傳承篇》

可分享予客戶

最新推出《財富管理 — 傳承篇》，剖析財富傳承潛在痛點，協助客戶如何實現財富增值，達成資產傳承。



精彩內容

- 解構傳統財富傳承選擇
- 分析財富傳承潛在痛點
- 拆解財富傳承個案

按此瀏覽：繁體中文 | 簡體中文

☆內容亮點☆

財富傳承傳統選擇

概括傳統財富傳承方法 (包括信託及遺囑) 的特點與局限。



無論身份　傳承皆是永恆藝術

分析進行財富傳承時面對的潛在痛點，以及可行的對應方法。



個案分析

拆解四個假設坊間個案及產品組合，並展示儲蓄、危疾、人壽等保險產品的可提供方案，滿足不同人生階段需要。





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財務策劃顧問可於2026年3月10日起登入Agency Corner、AIA Smart 、 i 學院 （ iAcademy ）及iEngage瀏覽及下載助銷工具：

《財富管理 — 傳承篇》

- 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 >「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 >「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 >「活然人生」保險計劃線上學習及內部牌照評測
- iEngage > News Feed > 市場資訊及客戶推廣 > 市場推廣及助銷策略

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Enclosure

Wealth Management – Legacy

Sharable with customers

The newly launched "Wealth Management – Legacy" analyses potential pain points to help clients realise wealth growth and legacy transition.



Highlights

- Deconstruct traditional wealth legacy options
- Analyse potential pain points in wealth legacy
- Deep-dive into case studies

View e-copy

Traditional Chinese | Simplified Chinese

☆Content Highlights☆

Wealth legacy options
An analysis of the features and limitation of traditional methods including trusts and wills.



Wealth legacy: An art for all
An exploration of the potential challenges in wealth legacy planning along with practical solutions.



Case studies
A breakdown of four hypothetical scenarios and product portfolios to demonstrate how savings, critical illness and life insurance products can address different needs at various life stages.





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The Sales Enablement Tools are available for view and download by financial planner at Agency Corner, AIA Smart, and iAcademy from 10 March onward:

Wealth Management – Legacy

- 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 > 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 > 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 > ProsperLife Insurance Plan Online Training and Product Internal License Test

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