**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

| | | | |
|---|---|---|---|
| Attn: | All EDD & Honorable 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 Agency Executives / IVS Executives | Dept: | Corporate Solutions |
| Date: | 21 April 2026 | Total pages: | 5 |

Subject: **(A260468) 優化「強積金客戶聲明及同意書」跟進機制及流程**
**Optimising Follow-up Mechanism and Workflow for "MPF Customer Declaration and Consent Form"**

為配合「積金易」(eMPF) 平台運作並確保佣金適時發放，企業業務即日起優化「強積金客戶聲明及同意書」（「同意書」）的跟進機制及流程，詳情如下：

## 更新一（只適用於成員）：簡化驗證流程 - 無須再遞交身份核實證明文件

為簡化營業同事操作，提交同意書時無須再遞交身份核實證明文件。以下為全新處理程序及注意事項，請務必遵循以確保佣金順利發放：

- **截取畫面：**向營業同事遞交申請後必須截取顯示有「eMPF 提交參考編號」的確認畫面。
- **遞交同意書：**將上述截圖連同已完成的最新同意書一併提交予 AIA（無須包括身份核實證明文件）。
- **提醒客戶：**請提醒客戶自行保留一份同意書副本以作記錄。
- **驗證與後續通知：**企業業務將根據 eMPF 平台回傳的數據核對參考編號及客戶資料，驗證成功後：
  - 系統將發送短訊 (SMS) 通知成員，確認已收到經由營業同事協助完成的同意書。
  - AIA 企業業務熱線會進行抽樣電話核實。

**重要事項：**
舊版本同意書將於 2026 年 12 月 31 日起不予受理，**建議 閣下由即日起使用最新版本之表格。**

| 各類別「友邦強積金客戶聲明及同意書」之最新版本表格 | | |
|---|---|---|
| **類別** | **下載路徑** | **最新版本編號** |
| 成員適用（按此查閱表格）<br>（按此查閱填寫教學及常見錯誤） | eAC > 強積金 > 下載 > 表格 | C45_v4 (04/2026) |
| 僱主適用（按此查閱表格） | | C45_v3 (03-2026) |
| 僱員適用（按此查閱表格） | | C44_v3 (03-2026) |

「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).


[AIA – INTERNAL]

**友邦香港**
香港北角電氣道 183 號
友邦廣場 12 樓

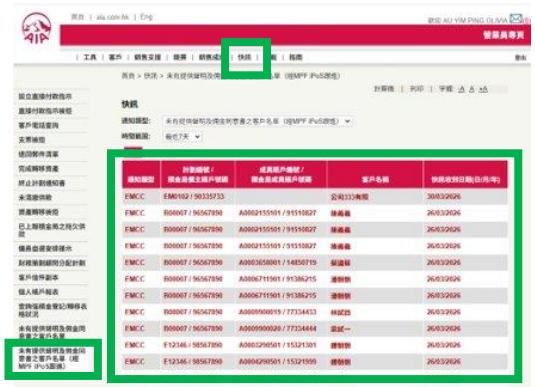
**AIA Hong Kong**
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

## 更新二：補交「強積金客戶聲明及同意書」之提醒及處理機制

若企業業務發現**已於 eMPF 成功 1) 開戶** 或 **2) 轉移資產至 AIA**，但尚未收到相關同意書之個案，將啟動以下提醒同意書跟進及補交機制：

**第 1 步**
**企業業務發出通知**

- 企業業務會透過 iEngage 及**營業員專頁（eAC）**通知營業同事相關個案。
- 點擊需要跟進的相關客戶，您將被重新導向至相應的處理頁面。

| iEngage | 營業員專頁（eAC） |
|---|---|
| 路徑：<br>業務 > 營運 > 企業業務 | 路徑：<br>強積金> 快訊 > 未有提供聲明及佣金同意書之客戶名單（經 MPF iPoS跟進） |
|  |  |

**第 2 步**
**於 iPoS 跟進及補交客戶同意書（新功能）**

針對名單上的個案，現可在iPoS 透過以下方式處理客戶同意書。

- **面對面處理**：於 iPoS 直接處理及完成客戶同意書（有關操作流程，請按此參閱附件第1-15頁）或；
- **遙距處理**：使用「友得簽」功能（有關操作流程，請按此參閱附件第16-33頁）

完整 MPF iPoS 用户手冊已上載至 eAC 以供營業同事參考。
（路徑：**eAC > 強積金 > 銷售支援 > 實用教學**）




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！

「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).



[AIA – INTERNAL]

**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

To align with the operations of the eMPF Platform and ensure timely commission payments, Corporate Solutions is optimizing the follow-up mechanism and workflow for the "MPF Customer Declaration and Consent Form" ("Consent Form"), effective immediately. Details are as follows:

## Update 1 (Applicable to Member Only): Simplified Verification – No Identity Verification Document Required

To simplify operations for Financial Planners, identity verification document is no longer required when submitting the Consent Form. Please strictly follow the new procedures and notes below to ensure smooth commission payout:

- Screen Capture: After submitting an application to the eMPF platform, you must capture the confirmation screen showing the "eMPF Submission Reference Number".
- Consent Form Submission: Submit the above screenshot along with the completed latest version of the Consent Form to AIA (Identity verification document is not required).
- Customer Reminder: Please remind customers to keep a copy of the Consent Form for their own records.
- Verification & Notification: Corporate Solutions will verify the reference number and customer information against data returned by the eMPF platform. Upon successful verification:
  - The system will send an SMS notification to the member confirming receipt of the Consent Form assisted by the Financial Planner.
  - AIA Corporate Solutions Hotline will conduct random phone verification checks.

Important Note:
Old versions of the Consent Forms will not be accepted starting 31 December 2026. Please use the latest versions effective immediately.

| Latest Versions of "MPF Customer Declaration and Consent Form" | | |
|---|---|---|
| Category | Download Path | Latest Version Code |
| Applicable to Member (Click here to view the form) (Click here to view the filling instructions and common errors) | eAC > MPF > Download > Form | C45_v4 (04/2026) |
| Applicable to Employer (Click here to view the form) | | C45_v3 (03-2026) |
| Applicable to Employee (Click here to view the form) | | C44_v3 (03-2026) |

「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).


[AIA – INTERNAL]

**友邦香港**
香港北角電氣道 183 號
友邦廣場 12 樓

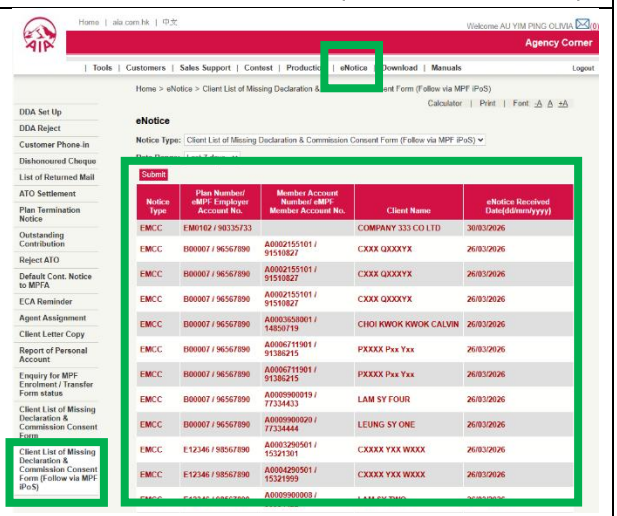
**AIA Hong Kong**
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

## Update 2: Reminder & Handling Mechanism for Resubmitting "MPF Customer Declaration and Consent Form"

The following reminder and resubmission mechanism of Consent Form will be activated if Corporate Solutions identifies cases that have successfully 1) Opened an account or 2) Transferred assets to AIA via the eMPF Platform but lack a matching Consent Form.

### Step 1 Notification from Corporate Solutions

- Corporate Solutions will notify Financial Planners of relevant cases via iEngage and eAC.
- Click on the customer requiring follow-up to be redirected to the processing page.

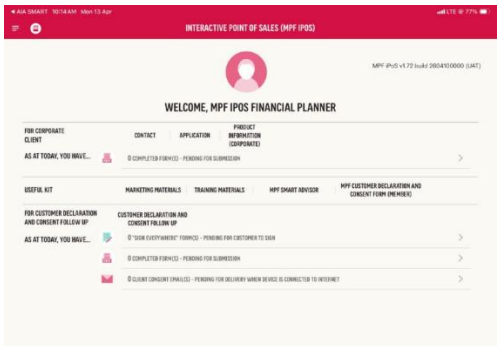
| iEngage | eAC |
|---|---|
| Path (TC Only):<br>業務 > 營運 > 企業業務 | Path:<br>MPF> eNotice > Client List of Missing Declaration & Commission Consent Form (Follow via MPF iPoS) |
|  |  |

### Step 2 Follow up and resubmit Consent Forms via iPoS (New Function)

For cases on the list, you can now handle Consent Forms via iPoS using the following methods:

- Face-to-Face: Process and complete the form directly in iPoS (Click here to view to pages 1-15 of the attachment for the workflow).
- Remote: Use "Sign Everywhere" function (Click here to view to pages 16–33 of the attachment for the workflow).

The complete MPF iPoS User Manual has been uploaded to eAC for your reference.
(Path: eAC > MPF > Sales Support > Practical Guide)




「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).



[AIA – INTERNAL]

**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

If you have any questions, please contact your designated Business Development Executives.

We wish you every success!

Yours faithfully,



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

「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).



[AIA – INTERNAL]