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2 Concorde Road,
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Memo

Attn:	All EDDs & Honourable Advisors / EDDs/ PSDDs/ SDDs/ DDs/ MICs/Agency Leaders/ Financial Planners (Hong Kong Only)	Dept:	Premier Agency Development Department
Co/Dept:	Mr. Alger Fung / Ms. Amy Chan / All Department Heads / Heads of Agency Division / ABDD – ABPs	Total page:	7
Date:	24 April 2026		

Subject: **(A260470) 頂尖企業家計劃 (只適用於香港)**
Prime Entrepreneur Programme (PEP) (For Hong Kong only)

友邦香港一直致力推行「最優秀代理」策略，除了培育年青人才，亦支援成熟族群再創事業，實現企業家理想。為確保不同人才都能獲得全面的支援配套，我們現推出「頂尖企業家計劃」，目的讓各界別專業人士以保險業作為職涯新賽道，打造可傳承及長遠發展的企業，協助他們維持專業顧問形象，快速掌握事業新領域。

有關計劃詳情請參閱下文。如有任何疑問，請聯絡營業拓展部或聯絡招募夥伴，或電郵至 aiahk.premieragency@aia.com 與卓越營業發展部同事查詢。

We are pleased to announce “Prime Entrepreneur Programme (PEP)”. Please refer to the captioned memo for details. For inquiries, please contact ABDD or Agency Recruitment Partners, or email to PAD (aiahk.premieragency@aia.com).

Best Regards,



Joel Lee
Head of Premier Agency Development
JL/pz/ja

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頂尖企業家計劃 (PEP):

招募對象：	符合監管機構基本登記入職要求
年齡：	46 至 60 歲
工作及學歷背景：	20 年工作經驗；或持大學學位或以上兼 10 年工作經驗
入息要求：	過往 12 個月平均年收入港幣 40 萬或以上
合資格招募者：	所有營業單位主管及財務策劃顧問
計劃申請日期：	2026 年 4 月 1 日起

(A) 合資格者

參加者必須符合以下資格：

1. 必須達到保險業監管局之要求，包括成功考獲卷一及卷三牌照並且達到基本學歷要求。
2. 合約生效日期必須為 2026 年 4 月 1 日或之後。
3. 本計劃不適用於擁有行業經驗人士，以保險業監管局登記記錄為準。
4. 本計劃不包括轉職、重新加入或復效的財務策劃顧問。
5. 已完成頂尖企業家(PEP) 合約的人士及通過 PEP 面試可申請本計劃。

(B) 招募對象的福利

1. 獲享財務策劃顧問合約內載列的所有基本福利，並將獲支付基本酬金(Normal Compensation)的資格。
2. 入職職銜為「高級財富管理經理」。
3. 可享有專屬津貼計劃 (LOU Package) (如適用)。
4. 獲享公司之會籍及獎賞的資格及可參加公司的競賽(如適用)。

(C) 招募者的福利

1. PEP 被視為全職財務策劃顧問。
2. 營業單位主管可從招募對象獲享基本酬金的福利（即基本 Override、ADOR 及 AMOR）。
3. PEP 的業績及活動量將被計算入營業單位之會籍及獎賞。
4. PEP 將被計算入營業單位之團隊成員人數。

(D) 申請方法

招募者/參加者必須完成以下申請流程：

1. 在「友招募 iRecruit」為招募對象建立準招募檔案，建立電子合約之 CR 合約申請，「申請職位」選項選擇**「財務策劃顧問」**。
2. 透過「友招募 」遞交 CR 合約所需文件，並額外提交以下文件：
   - 已填妥「頂尖企業家 (PEP) 申請表格」*(參考附件)
     請將已簽署之「頂尖企業家 (PEP) 申請表格」上載至「友招募 iRecruit」
     路徑：iRecruit → 「電子合約」→「文件管理」→「其他」
3. 將已簽署之「頂尖企業家 (PEP) 申請表格」電郵發送至 aiahk.PEPapplication@aia.com
4. 成功通過 PEP 面試。

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(E) 培訓要求

合約首 3 個月 – 完成以下其中一個必修課程：

1. 新晉財務策劃顧問核心培訓課程 (FPTPCORE)；或
2. 高端/優秀人才專屬(普通話)遙距視像培訓課程 (VPTH-TTPS/QMAS)
   如於過去一年年收入超過港幣 60 萬或以上，可特別申請參加高端/優秀人才專屬(普通話)遙距視像培訓課程 (VPTH-TTPS/QMAS)
   - 營業單位主管必須於友招募(iRecruit)遞交入息證明以作審批

合約首 12 個月 – 最少完成以下任何一個「卓越精英進階課程」：
如未能完成，所持有的每月津貼計劃將被終止。

1. 卓越精英進階課程：（一）業務拓展-高端市場開拓及大灣區市場機遇
2. 卓越精英進階課程：（二）進階銷售技巧-尋找客戶邀約及成交處理異議
3. 卓越精英進階課程：（三）全方位產品攻略-保障及儲蓄型方案銷售

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頂尖企業家計劃申請表格

此表格適用於2026年6月30日或之前之申請。請填妥此申請表並且使用「友招募 iRecruit」將此申請表上載至「電子合約」→「文件管理」→「其他」，以及電郵發送至aiahk.PEPapplication@aia.com，供Recruitment Processing處理：

合資格條件核對清單：

☐ 年齡46至60歲
☐ 過往24個月平均年收入HK$420,000
☐ 學士學位/本科或以上畢業 及 10年或以上工作經驗；或
20年或以上工作經驗

申請人資料：

英文全名(與身份證相同):_____ 身份證號碼.:_____

申請人簽署:_____ 申請日期:_____

我聲明，上述所提供資料準確無誤，並且明白頂尖企業家計劃合約的條款和細則。所提供的資料將會保密及只作日後招募之用。

營業單位主管資料：

英文全名:_____ 財務策劃顧問號碼:_____

營業單位名稱:_____ 簽署:_____ 簽署日期:_____

區域總監資料：

英文全名:_____ 財務策劃顧問號碼:_____

區域名稱:_____ 簽署:_____ 簽署日期:_____

只供 Recruitment Processing 專用：

批核人簽名:_____ 日期: _____
(姓名)

備註:
_____

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Prime Entrepreneur Programme (PEP):

Eligible Candidates：	Fulfil IA entry requirement
Age:	46 to 60
Employment and Academic background:	At least 10 years of working experience & bachelor's degree or above; OR At least 20 years of working experience
Past income:	Annual income of HK$400,000 or above over the past 12 months
Eligible Recruiters:	All Financial Planners and Agency Leaders
Scheme Period:	From 1 April 2026

(A) Eligibility

Applicants must meet all of the following criteria:

1. Must fulfil Insurance Authority requirement including pass LC paper I and III and meet minimum academic requirement.
2. The contract must be effective on or after 1 Apr 2026.
3. Not applicable for industry recruitment, as determined by IA registration records.
4. Transferred, re-joined, reinstated Financial Planners will be excluded.
5. Must complete the contract of PEP application and pass PEP interview.

(B) Benefits to Eligible Candidate:

1. Eligible for all normal benefits as stated in the Career Representative's contract and will be paid on normal compensation.
2. Initial appointment title is "Senior Wealth Management Manager".
3. Eligible for exclusive LOU package (if applicable).
4. Eligible for the Company's Clubs and Awards and Company Contest where applicable.

(C) Benefits to Recruiter:

1. PEP candidate is treated as full-time Financial Planner.
2. Agency Leaders will be entitled Normal Compensation (i.e., Basic Override, ADOR & AMOR) generated from PEP candidate.
3. Production/ Activity generated by PEP candidate will be counted towards the entitlement of Clubs & Awards.
4. PEP candidate will be included in the headcount of the Agency.

(D) Application Procedure

1. Create the profile for eligible candidate via iRecruit and create CR contract. Select **"Financial Planner"** from option "Application Title" via iRecruit.
2. Provide full set documents of CR contract together with following extra documents via iRecruit.
   a. Completed APPLICATION FORM FOR PEP CONTRACT* (as attached, or download from iRecruit)
   *Please submit the "APPLICATION FORM FOR PEP CONTRACT" via iRecruit
   Submit route: iRecruit → Electronic Contracting → Document Management → Others
3. Send the "APPLICATION FORM FOR PEP CONTRACT" by email to aiahk.PEPapplication@aia.com
4. Pass PEP interview.

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(E) Training Requirement

Within first 3 contract months – Complete any of below compulsory training courses:

1. Financial Planner Trainee Program – Core (FPTPCORE)
2. TTPS/QMAS Virtual Training
   New Agents of PEP who have an annual income of HK$600,000 or above in the past one year can specially apply to join this exclusive training Course (VPTH-TTPS/QMAS)
   - Leaders must provide the income proof via iRecruit for approval

Within first 12 contract months – Complete at least ONE of the following “Elite Program” courses
Failure to complete will result in cease of the monthly bonus package

1. Course 1: Business Development - HNW Development and Greater Bay Area Market Opportunities
2. Course 2: Advanced Sales Skills - Prospecting and Handling Objections
3. Course 3: Comprehensive Product Strategy – Sales of Protection and Savings Plans

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APPLICATION FORM FOR PEP CONTRACT

This form is applicable to applications submitted on or before 30 Jun 2026. Please complete this application form and upload it under "Electronic Contracting" in iRecruit, and send the Application Form by email to aiahk.PEPapplication@aia.com for Recruitment Processing's further handling:

ELIGIBILITY CHECKLIST:

- ☐ Aged 46 to 60
- ☐ Average annual income of HKD 420,000 over the past 24 months
- ☐ Bachelor's degree or above with at least 10 years of working experience; OR
  At least 20 years of working experience

APPLICANT'S PARTICULARS

English Name (same as stated in HKID):_____ HKID No.:_____

Signature:_____ Date:_____

I certify that the information given in this application is true and correct, and I understand all the terms and conditions as listed in the Prime Entrepreneur Program contract. All the information provided by applicants will be treated in strict confidence and used for recruitment purpose only.

AGENCY LEADER'S DETAILS

Name:_____ Financial Planner Code:_____

Agency Name:_____ Signature:_____Date:_____

DISTRICT DIRECTOR'S DETAILS

Name:_____ Financial Planner Code:_____

District Name: _____ Signature:_____ Date:_____

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Approved by: _____ Date: _____
<<Name>>

Remarks:

_____

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