AIA Hong Kong

Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333

AIA.COM.HK

Memo

Attn: All EDDs & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)

Copy: Mr. Alger Fung / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD / ABDD – ABPs

Date: 20 May 2026

From: Alfred Yip

Dept: Agency Digital, Analytics, & Bus. Acquisition – Bus. Acquisition

Total page: 6

(A260539)「保單分配專員計劃」 專屬獎賞競賽 - 大灣區醫院深度體驗之旅
Lead Assignment Specialist Programme Contest – GBA Hospital Experience Tour

為進一步提升我們對現有客戶的服務質素，並配合財務策劃顧問在保單分配及相關服務方面的最新要求，公司將推出「**保單分配專員計劃**」（A260537）。

凡達成指定要求的財務策劃顧問，將有機會獲邀親身考察大灣區領先醫療機構的寶貴機會。

透過此深度交流行程，參加者將加深對大灣區醫療設施、臨床水平及跨境醫療安排的認識，從而提升專業能力，更有效支援有需要於大灣區接受醫療服務的客戶。

詳情請參閱以下通告。

如有查詢，請電郵至 AIAHK.Agency-Bus-Acquisition@aia.com。

To further enhance our service for existing customers and align with the latest requirements for Financial Planners regarding policy reassignment and related services, the Company is launching the **"Lead Assignment Specialist Programme"** (Memo A260537).

Financial Planners who meet the specified requirements may be invited to visit leading medical institutions in the Greater Bay Area.

Through this immersive experience, participants will gain deeper insights into clinical capabilities, medical facilities, and cross-border healthcare arrangements. This enhanced understanding will empower Financial Planners to better support customers who may require medical treatment within the GBA.

For details, please refer to below memo.

Please see the details below. For inquiries, please email to AIAHK.Agency-Bus-Acquisition@aia.com

Best Regards,

Alfred Yip
Head of Agency Digital, Analytics and Business Acquisition

For Internal Use Only 僅供內部傳閱

[AIA - INTERNAL]

AIA Hong Kong

Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333

AIA.COM.HK

健康長久好生活

競賽規則

競賽資格
所有營業單位主管及財務策劃顧問

競賽日期
保單分配日期: 2026 年 2 月 1 日至 2026 年 5 月 31 日

- 以2026 年6月14日跟進狀態為準

規則
達成所有競賽要求之財務策劃顧問，將按保單分配跟進率排名

競賽要求(需符合以下所有要求)		獎賞	名額
獲分配的客戶數目	保單分配跟進率 (參考附錄一)	大灣區醫院一日深度考察團 (詳情如下)	40 名
>= 5 客戶	>= 80%[1]		

[1] *如有兩位或以上財務策劃顧問的跟進率相同，最後排名將以競賽期間獲分配的客戶數目較多者為準。*

參觀團詳情

醫院介紹 – 包括臨床專科、基礎設施及服務模式概覽

參觀日期（暫定）：2026 年 7 月 10 日

地點（暫定）：中山火炬開發區人民醫院 及 中山陳星海中西醫結合醫院

醫院代表分享環節 – 與醫院高層或醫療專業人員對話，了解醫療服務流程與支援安排

專人導覽醫院參觀 – 參觀醫院核心部門，包括門診、住院及診斷設施

此考察團將包括午餐、來回香港交通及旅遊保險。

AIA Hong Kong

Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333

AIA.COM.HK

健康長久好生活

Contest Rules

Eligibility
All Financial Planners and Agency Leaders

Contest Period
Policy Assigned Period: 1 February 2026 – 31 May 2026
Follow up status as of 14 Jun 2026

Rules
Financial Planner with all minimum requirements fulfilled and rank by top follow up %

Minimum Requirement		Award	No. of awardee
No. of customer assigned	Policy Assignment Follow-up ratio (Refer to Appendix 1)	Immersive GBA Hospital Tour (see details below)	40 pax
>= 5 customers	>= 80%[1]		

[1] *In case of same follow-up ratio, the final ranking shall be determined by the more # assigned customer during the contest period.*

Tour Details

Hospital Introduction – Overview of clinical specialties, infrastructure and service model

Date of visit (Tentative) : 10 July 2026

Venue (Tentative) : Zhongshan Sixth People's Hospital Torch Development Zone People's Hospital & Zhongshan Chen Xinghai Hospital of Integrated Traditional Chinese and Western Medicine

Sharing Sessions by Hospital Representatives – Dialogue with hospital senior management or medical professionals on medical service processes and support arrangements

Guided Hospital Tour – Visit core hospital departments such as outpatient, inpatient and diagnostic facilities

This one-day tour will include lunch meal, transportation from HK and travel insurance.

For Internal Use Only 僅供內部傳閱

[AIA - INTERNAL]

AIA Hong Kong

Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333

AIA.COM.HK

健康長久好生活

一般規則：

1. 所有獎賞不可使用作任何保單銷售之誘因、轉售、轉讓他人、退換或轉換成以現金發放，安排均以最終安排為準。

2. 所有獲獎者必須於獎賞發放時仍與持有效合約。

3. AIA 保留隨時修改競賽規則或獎賞之權利，恕不另行通知。

4. 對於有關提供獎品之供應商所提供的獎品及服務質素，AIA恕不承擔任何責任。

5. 如有任何異議，AIA以最後決定為準。

6. 考察團期間請勿向中國境內人士直接或間接招攬保險業務, 包括但不限於: 派發名片／產品介紹冊/任何推銷單張或提供任何海外聯繫方式(例如海外電話號碼)以邀請客戶到香港/澳門進行保險活動, 詳情請參閱(A250956) “提醒：嚴禁進行跨境銷售活動” 通告。

General Rules & Regulations:

1. All prizes cannot be used for any inducement for new policy selling, resell, transferred to others, refund and exchange for cash. All arrangements are subject to final confirmation from AIA.

2. All winners must hold a valid contract at the time of prize distribution.

3. AIA reserves the right to amend the contest rules or prizes at any time without prior notice.

4. AIA accepts no liability for the quality of prize and services provided by the respective merchants.

5. In the event of dispute, AIA's decision is final and conclusive.

6. During the tour, please do not directly or indirectly solicit insurance business from individuals within Chinese Mainland, including but not limited to distributing name cards, product brochures, or any promotional leaflets, or providing any overseas contact details (e.g. overseas telephone numbers) for the purpose of inviting clients to Hong Kong or Macau to conduct insurance-related activities. For details, please refer to memo (A250956) “Reminder on Prohibition of Offshore Solicitation.”

AIA Hong Kong

Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333

AIA.COM.HK

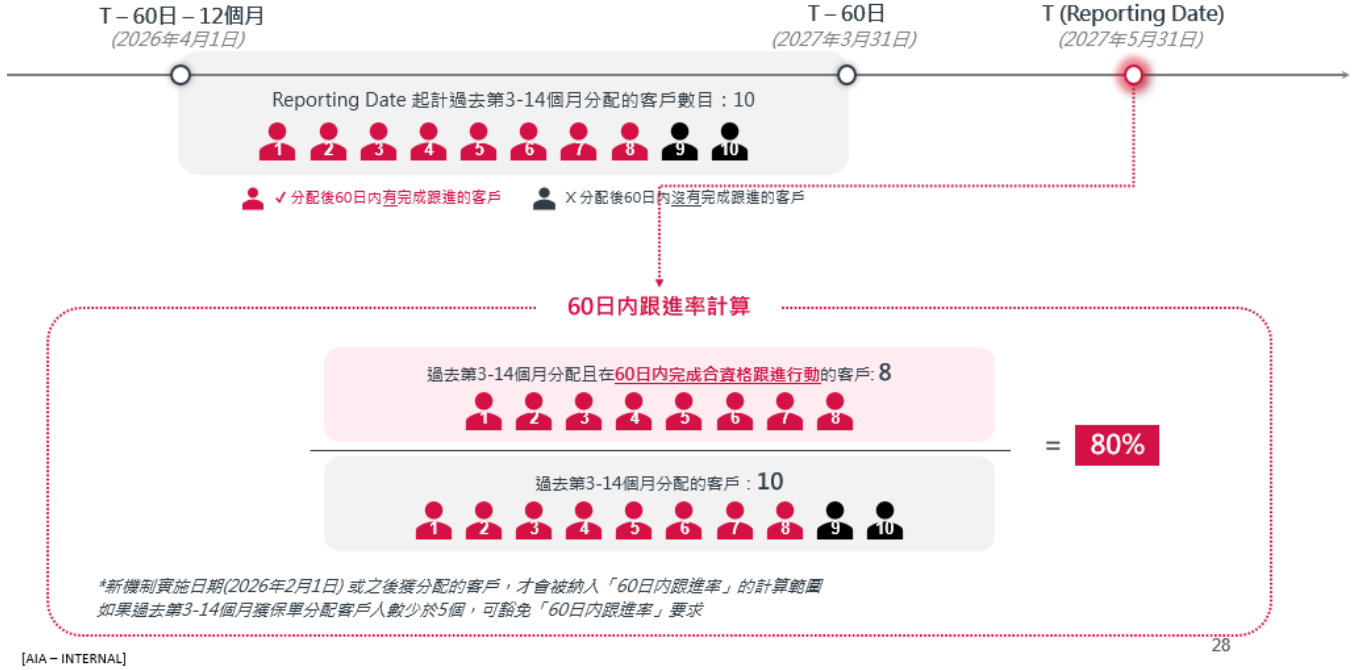
健康長久好生活

附錄一 Appendix 1

於CRM保單分配系統可以查看保單跟進情況，檢視整體跟進率表現



“60日內跟進率”計算示例



28

[AIA – INTERNAL]

For Internal Use Only 僅供內部傳閱

[AIA - INTERNAL]

AIA Hong Kong

Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333

AIA.COM.HK

健康長久好生活

附錄二 Appendix 2

保單分配專員計劃 | 四大綱領

全心為客 ❤ 堅守使命



 AIA confidential and proprietary information. Not for distribution.

For Internal Use Only 僅供內部傳閱

[AIA - INTERNAL]