AIA Hong Kong
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Memo

Attn.:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	**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 / Mr. Chris Lau / All Department Heads / Heads of Agency Division / BPs / Call Centre	**Total pages:**	2 pages + enclosure
Date:	29 May, 2026		
Subject:	A260567 「財富盈活儲蓄保險計劃」助銷工具系列尊貴登場 Launch of Sales Enablement Tools for Wealth Flexi Savings Insurance Plan		

配合「財富系列」 — 財富盈活儲蓄保險計劃[1,2]將於 2026 年 6 月 1 日推出，我們呈獻一系列尊尚助銷工具，專從高淨值客戶的**財富傳承規劃**、**資金靈活調配**及**長遠資產增值**的多維度需要出發，助客戶築構長青的家族財富基石，實現跨世代財富延續。靈活運用助銷工具，讓您如同產品圖像概念的錦鯉般，鯉躍龍門、順勢而上，開拓源源不絕的萬象財機！



全部均可分享予客戶！

「財富盈活儲蓄保險計劃」

產品簡介 Product Brochure

以**錦鯉**之雅為引，**匠心構築三大篇章**，**綻放產品核心價值**，讓您以魚之勢，引領客戶展開財富盈活新篇章



繁體版 PTA001419
簡體版 PTA001420
英文版 PTA001418

產品精明包 Smart Kit

延伸呈現產品相關**重要洞見**，匯聚**市場趨勢**、**更多客戶案例**與**公司優勢**，拓展分享深度與說服力



繁體版 **簡體版**

產品一頁精華 One-pager Spotlight

一頁匯聚**產品精華**與**客戶案例**，提煉關鍵重點，分享高效專業



繁體版 **簡體版**

【增值服務】【市場首創】[3]
「未來心願安排」[4]

服務簡介單張

細緻說明客戶於**不同情況預設指示的規劃邏輯**，協助作出**有序安排**；並以**案例與圖解輔助**，讓方案更直觀易懂



繁體版 PTA001416
簡體版 PTA001417
英文版 PTA001415

服務精粹短片

New !

以**客戶故事**呈現客戶需求與心聲，並展現增值服務作為**單一整合方案**如何協助**預先訂立指示**，於關鍵人生時刻**成就臻於至善的傳承規劃**，延續價值與心意

誠邀鑒賞：繁體版 簡體版

(於 6 月 5 日推出)



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In tandem with the launch of the **new "Wealth Series" — Wealth Flexi Savings Insurance Plan**[1,2] on 1 June 2026, we specifically crafted **a suite of sales enablement tools**. Thoughtfully designed to address the multi-dimensional needs of high-net-worth customers — spanning **legacy planning, liquidity flexibility, and long-term wealth accumulation** — these tools empower you to help customers build enduring family wealth foundations and achieve seamless intergenerational wealth succession.

By leveraging these tools, you can rise to the opportunity — **like the koi featured in the product brochure's visual concept** — unlocking new momentum and tapping into a wealth of opportunities within the high-net-worth segment.



All sales tools can be shared with customers!

Wealth Flexi Savings Insurance Plan

Product Brochure

Inspired by **the elegance of koi**, **thoughtfully crafted 3 key chapters** that precisely **bring core product values to life**—empowering you to ride the momentum of growth and lead customers into a new chapter of wealth



English PTA001418
Traditional Chinese PTA001419
Simplified Chinese PTA001420

Smart Kit

Go beyond product features—bringing together **market trends**, **additional customer cases**, and **corporate strengths** to deepen insights and enhance the impact and persuasiveness of the sharing



Traditional Chinese
Simplified Chinese

One-pager Spotlight

A one-page summary that brings together **product highlights** and **customer case**—distilling key insights for sharing with customers efficiently and professionally



Traditional Chinese
Simplified Chinese

【Value-added service】【First-in-market】[3]
Future Wishes Arrangement[4]

New !

Service Flyer

Provide a detailed illustration of the **planning logic for setting advance instructions under different moments**, helping customers make **structured arrangements**; supplemented with **case studies and visuals** to make the solution more easy to understand



English PTA001415
Traditional Chinese PTA001416
Simplified Chinese PTA001417

Service Essence Video

Using a **customer story** to demonstrate the needs of csutomers—showing how **this single integrated solution** can help customers pre-set instructions, and at pivotal life moments, achieve a refined legacy plan that carries forward their values and intentions across time

Explore:
Traditional Chinese
Simplified Chinese
(Available from 5 June)



For details, please refer to the enclosure. **Before the launch of the product, you MUST NOT disseminate, distribute, or circulate any information related to the product including but not limited to this memo to any person or party outside of AIA.**

Best regards,

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

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附件 Enclosure

<table>
<tr><td>產品簡介及
附帶的資料概要
Product Brochure and the enclosed Key Factsheet
</td><td colspan="2">財務策劃顧問可於 <u>2026 年 5 月 29 日</u>起登入 Agency Corner 下載中英文電子版本
印刷版本將於 <u>2026 年 6 月 5 日</u>起開始送抵香港及澳門各營業辦事處

The Chinese and English electronic version will be ready for download by financial planner in Agency Corner on <u>29 May 2026</u>
Printed version will be delivered to agency offices in Hong Kong and Macau starting from <u>5 June 2026</u>

產品簡介編號 PTA number for Brochure:
• <u>繁體版 Traditional Chinese：PTA001419</u>
• <u>簡體版 Simplified Chinese：PTA001420</u>
• <u>英文版 English：PTA001418</u></td></tr>
<tr><td rowspan="2">助銷工具
Sales Enablement Tools</td><td>產品精明包 Smart Kit

<u>繁體版 Traditional Chinese</u>
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<tr><td>「未來心願安排」服務簡介單張
Future Wishes Arrangement Service Flyer

<u>繁體版 Traditional Chinese PTA001416</u>
<u>簡體版 Simplified Chinese PTA001417</u>
<u>英文版 English PTA001415</u></td><td>「未來心願安排」服務精粹短片
Future Wishes Arrangement Service Essence Video

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	財務策劃顧問可於 **2026 年 5 月 29 日**起登入 Agency Corner、AIA Smart 和 iAcademy 瀏覽及下載助銷工具： • 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 > 財富盈活儲蓄保險計劃> 助銷配套 • AIA Smart > 資源中心 > 產品資料庫 > 終身壽險及儲蓄壽險 > 財富盈活儲蓄保險計劃 > 助銷配套 • (適用於香港地區之財務策劃顧問) i 學院 (iAcademy) > 網上學習課程 > 內部牌照 > 「財富盈活儲蓄保險計劃」線上學習及內部牌照評測 (適用於澳門地區之財務策劃顧問) i 學院 (iAcademy) > 網上學習課程 > 內部牌照 > 澳門內部牌照 >「財富盈活儲蓄保險計劃」線上學習及內部牌照評測 2026 年 6 月 1 日起登入 iEngage 瀏覽及下載助銷工具： • iEngage > News Feed > 市場資訊及客戶推廣 > 市場推廣及助銷策略 Starting from **29 May 2026**, the Sales Enablement Tools will be available for view and download by financial planner at Agency Corner, AIA Smart, and iAcademy: • Agency Corner > Departments > Product Innovation, Development & Delivery > Whole Life, Savings & Endowment > Wealth Flexi Savings Insurance Plan > Sales Enablement • AIA Smart > Resource Centre > Product Library > Whole Life, Savings & Endowment > Wealth Flexi Savings Insurance Plan > Sales Enablement • (Applicable to Financial Planner in Hong Kong Region) iAcademy > E-Learning Training > Internal License > Wealth Flexi Savings Insurance Plan Online Training and Internal License Test (Applicable to Financial Planner in Macau Region) iAcademy > E-Learning Training > Internal License > Macau Internal License > Wealth Flexi Savings Insurance Plan Online Training and Internal License Test

備註 Remarks：

1. 此文件不涵蓋產品的完整範圍及條款，詳情請參閱產品簡介及產品資料冊。
   This document does not include the full scope and terms and conditions of the products, please refer to the product brochure and the launch pack for details.
2. 根據財務策劃顧問持有的相關牌照，這些計劃只可於香港及澳門境內推廣。所有相關銷售及市場推廣活動以及申請程序，必須於香港及澳門境內進行。
   These plans can only be promoted within Hong Kong and Macau according to the financial planners' relevant license. All related sales and marketing activities, and application must be taken place within Hong Kong and Macau.
3. 截至 2026 年 6 月 1 日，與香港主要保險公司之同類型服務比較。「未來心願安排」之市場首創是指「未來心願安排」讓保單持有人能在一項綜合的增值服務中，就不同特定觸發事件作出不同指示的特點。
   As of 1 June 2026, compared against similar services offered by Hong Kong major insurance companies. First-in-market refers to Future Wishes Arrangement's feature which allows the policy owner to make different instructions for different specified triggering events in one integrated value-added service.
4. 「未來心願安排」僅提供予符合我們資格要求的指明保險計劃及指定保單。保單必須在香港繕發及「保單暫管人安排」於保單下未被指定或行使。「未來心願安排」並不適用於公司投保保單及信託持有人保單。「未來心願安排」乃增值服務，並非產品特點，因此並不於財富盈活儲蓄保險計劃保單契約下提供。我們有絕對酌情權以決定是否批准申請，並保留全權絕對酌情決定權隨時取消「未來心願安排」或更改其條款及條件或任何相關要求。
   Future Wishes Arrangement is only available to specified insurance plans and designated policies which meet our eligibility requirements. The policy must be issued in Hong Kong and Transitional Owner Arrangement is not designated for or being exercised under the policy. It is not applicable to corporate-owned policies and trust-owner policies. It is a value-added service and not a product feature, therefore it is not offered under the policy contract of Wealth Flexi Savings Insurance Plan. Application is subject to our approval to be determined at our discretion. We reserve the right to withdraw the Future Wishes Arrangement or change its terms and conditions or any related requirements at any time at our sole and absolute discretion.