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: Claudia Lau
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Co/Dept:

Dept: Operations

Copy: All Department Heads

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Total page: 1 + Appendix 1

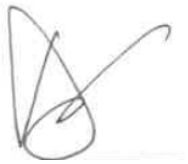
Subject: (Ref: A260569) 保戶服務小提示 05/2026
Policyowner Service Tips 05/2026

為協助財務策劃顧問更有效地支援保單持有人作更改申請，我們整理了一些實用小貼士，包括 iChange 使用小提示。以讓整個更改申請流程更簡單有效。詳情請參閱附錄。

如有任何查詢，請於 iEngage/PES 使用 Chatbot 進行查詢。

To help financial planner support policyowner in submitting change requests, we have put together some useful tips, including iChange tips, to make the submission process smooth and easy. Please refer to the Appendix for details.

Should you have any queries, please enquiry by using Chatbot in iEngage/PES.



Claudia Lau

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附件: 保戶服務小提示 05/2026
Appendix: Policyowner Service Tips 05/2026

1. 問: 如何查詢待決事項狀態及詳情?
Q: How to check pending status and details?

財務策劃顧問可透過 PES 查閱待決狀態及詳情:

- PES→ 點擊「**保戶服務申請紀錄**」→**輸入營業員號碼**→所有現時待決事項會列出，並列出其申請日期、限期日及最後之跟進日期
- 點擊 " **Pending**", 其待決事項的詳情便會列出。

Financial Planner can view the pending status and details via PES:

- PES → Click "**POS**" → **Enter Agent Code** → All current pending items will be listed, including the request received date, deadline, and last pending date.
- Click "**Pending**" to view the details of the pending items.



2. 問: 如何在 iChange 中搜尋表格?
Q: How to search forms in iChange?

如未能在 iChange 保單服務申請列表中找到所需的更改申請表格，財務策劃顧問可透過以下方式在 iChange 中搜尋表格:

- 搜尋申請→熱門關聯字中點選「其他申請表格」→ 可在搜尋欄內輸入表格號碼

If unable to find the change request form under the iChange application list, Financial Planner can search for form numbers in iChange via below method:

- Search Application → select "Other Change Request Forms" under the Hot Keywords →enter the form number in the searching field

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3. **問: 在申請計劃更改時，可以同時申請 Vitality 系列嗎?**
   Q: Can I apply vitality series when apply plan change?

   答：不適用於申請 Vitality 系列，因該服務僅適用於新業務申請或特定推廣活動。請勿勾選在 iChange 中 Vitality 選項，否則以下待決事項將發出。
   待決事項：AIA Vitality 僅適用於新業務申請

   A: Cannot apply vitality series as it is only applicable to New Business application or special campaign. Please note that do not tick the Vitality check box in iChange, or else below pending will be issued.
   Pending: AIA Vitality only applicable to New Business

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4. **問: 如何提交已簽署的修訂建議書（Counter Offer Letter）**
   Q: How to submit counteroffer letter?

   答：請透過郵寄方式提交已簽署的實體修訂建議書，iChange 上傳功能不被接受。

   A: Please submit the physical signed Counter Offer via mailing. iChange upload function is not acceptable.

5. **問: 向客戶支付款項時，需要提供哪些文件?**
   Q: What documents are required when issue payment to policyowner?

   答：申請時請注意以下文件要求：
   - 清晰的身份證明文件（需包括正面及背面）
   - 有效的旅遊證件（如客戶未持有香港永久性居民身份證）
   - 最近 3 個月內的銀行戶口有效證明（如適用，例如電匯時需要）

   A: Please ensure the following documents are provided when submitting the application:
   - A clear copy of the identity document (both front and back)
   - A valid travel document (if the customer does not hold a Hong Kong Permanent Identity Card)
   - Valid proof of bank account within the last 3 months (if applicable, e.g. for telegraphic transfer)

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