**AIA Hong Kong**
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| Attn: | EDDAs / EDDs / PSDDs / SDDs / DDs / MICs / All Agency Leaders / Selected Financial Planners (Hong Kong & Macau) | From: | Premier MDRT Development Department |
| Co/Dept: | Mr. Alger Fung / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / Heads of Agency Division / ABDD - ABPs | | |
| Date: | 16 June 2026 | Total Page: | 3 pages |

**Subject: (A260611) 2026 年度「復旦大學－友邦保險」研學課程挑戰賽**
**2026 "Fudan University – AIA" Professional Training Programme Challenge**

為鼓勵達到 MDRT 的精英持續拓展客戶基礎，並開拓高淨值市場，不斷增值技能，公司誠意推出**2026 傑出卓越顧問專屬競賽**，邀請達標精英參與由**復旦大學及友邦香港及澳門合辦的研學課程**。此課程自去年**首次推出以來反應極為熱烈**，參與的學員均給予**高度評價**，並一致認同課程內容務實，能即時應用於高端客戶市場，帶來顯著成效。有見及此，今年課程載譽歸來，邁入第二屆，並**進一步全面升級課程內容，為精英提供更嶄新、更貼近市場趨勢的學習體驗**。

復旦大學貴為中國人自主創辦的第一所高等院校，於泰晤士世界大學排行榜排名第 39 位，亦是國內首批 985、211 重點建設高校，及九校聯盟 (C9) 之一。與 AIA 相同，復旦大學的保險教育也是始於 1919 年，為保險業服務超過一個世紀，可謂「保險業領軍人才搖籃」。

**「復旦大學－友邦保險」研學課程緊貼高端市場趨勢，為參與者提升在高淨值客群中的競爭優勢，範疇包括：**

- ✓ **行為金融視角下的保險行為與消費者心理** UPDATED
- ✓ **低利率低通脹時代貨幣政策的新邏輯** NEW
- ✓ **中國內地婚姻與民商法實務** NEW
- ✓ **財富稅務籌劃及政策解讀** UPDATED
- ✓ **家族信託、離岸信託實務及風險案例** NEW
- ✓

課程還包括參觀復旦大學校史館，認識復旦 120 年的歷史厚度和學術底蘊。如此難得機會，各位不容錯過！課程內容及參觀行程以公司最終公佈為準。有關競賽詳情請參閱下文。如有任何疑問，請聯絡閣下之營業拓展部或電郵至 (premiermdrt@aia.com) 與卓越圓桌會員拓展部同事查詢。

We are pleased to launch **2026 "Fudan University – AIA" Professional Training Challenge** exclusive for 2026 Elite Premier Advisor (EPA). Please refer to the captioned memo for contest details. For inquiries, please contact respective ABDD or email to PMDD (premiermdrt@aia.com).

Best regards,



Donna Cheung,
Head of Premier MDRT Development
DC/nt/cc/al

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# 2026 年度「復旦大學 – 友邦保險」研學課程挑戰賽

**競賽日期:** 2026 年 6 月 1 日至 10 月 31 日

**競賽資格:** 所有營業單位主管及財務策劃顧問

**競賽規則及獎賞：**
於競賽日期內完成競賽要求及排名可獲邀參與「復旦大學 – 友邦保險」研學課程，安排如下：

| 競賽要求 | 獎賞 [i] | 獎賞名額安排 [ii] |
|---|---|---|
| 競賽日期完結前完成 **2026 傑出卓越顧問**要求 [iii, iv] | **「復旦大學 – 友邦保險」研學課程參與資格 (名額：70 位)** | 以競賽日期內的個人計算福利之首年佣金積分 (FYCS) 排名 [iv] 作優先報名 |

i. **課程暫定為 3 日 2 夜，2027 年 1 月 9 至 11 日於上海復旦大學展開。完成所有課程者，可獲授予校級結業證書 (根據大學規定，缺席任何一節課將被視為未能完成)。獎賞已包括課程及結業禮午餐費用。**
**而出席者需自費安排住宿、其他膳食及來回香港至上海交通。**

ii. **名額有限；如有排名較高者於指定時間不作報名確定，則其名額會順序給予其後排名者補上。已確定報名但最終缺席課程者或未能獲得結業證書者，將被收取港幣 $10,000 行政費 (從報名者的公司出糧戶口內扣除) 。**

iii. 同時達到「2026 卓越顧問」及「MDRT 2027」要求 (請參閱 2026 年會籍及獎賞手冊)，並擁有最少 2 位高淨值客戶^
^高淨值客戶：於 2026 年度內，同一位客戶 (保單持有人) 透過同一位營業員，成功投保 AIA 個人保險計劃 (「新保單」)，保單(扣除任何合資格折扣前 (如適用) 的累計之年繳保費達 10 萬美元或一次性繳付保費達 100 萬美元。

iv. 以 2026 年 10 月 31 日 iPA 進度報告為準。

**一般規則：**
1. 競賽結果以保單冷靜期後作調整為準。AIA 保留就調整後之競賽結果及就任何違規銷售行為追討已發放獎賞之權利。
2. 課程出席資格不得轉讓。獎賞及嘉許不可轉讓及轉換現金。
3. 財務策劃顧問及營業單位主管必須於課程舉行期間與公司仍持有有效合約，方能出席課程。
4. AIA 保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
5. 如有任何異議，以 AIA 最後決定為準。

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# 2026 "Fudan University – AIA" Professional Training Programme Challenge

**Contest Period:** 1 June to 31 October 2026

**Contest Eligibility:** All Agency Leaders & Financial Planners

**Contest Rules & Awards:**
Those who complete contest requirements and rankings during contest period will be invited to attend 2026 "Fudan University – AIA" Professional Training Programme", details as follows:

| Requirement | Award [i] | Award Quota Allocation [ii] |
|---|---|---|
| Achieve requirements of **2026 Elite Premier Advisor** by end of contest period [iii, iv] | **Eligibility to attend 2026 "Fudan University – AIA" Professional Training Programme (Quota: 70 qualifiers)** | Priority enrolment will be according to top qualifiers ranked by Personal FYCS within contest period [iv] |

i. **Training Programme tentatively set for 3 days and 2 nights on 9th – 11th January 2027 at Fudan University in Shanghai. Participants who complete ALL the Training Programme will receive a certificate of completion (According to the University's regulations, absence from any session will be considered as failure to complete). Programme and graduation ceremony lunch fees are covered by the award.**
**While qualifiers shall arrange and pay for their own accommodation, other meals, and travels between Hong Kong and Shanghai.**

ii. **Quotas are limited. If higher-ranked qualifiers do not confirm enrolment within the specified period, their quotas will be offered to the next in line. Those who confirmed but eventually fail to attend or fail to receive the certificate of completion, will be charged an HKD $10,000 administrative fee (deducted from their company payroll account).**

iii. Fulfil both "2026 Premier Advisor" and "MDRT 2027" requirements (Please refer to 2026 Clubs and Awards Manual), and with at least 2 high-net-worth customers^.
^High-net-worth customer: In 2026, same customer (policy owner) applies for individual AIA life insurance plan ("New Policy") with the same agent, with total annualized premium for policy(ies) (before any eligible discount, if any) meeting at least US$100,000 or US$1,000,000 for on-time premium payment.

iv. Based on iPA Progress Report as of 31 October 2026.

**General Rules and Regulations:**
1. The result of the challenge shall be adjusted according to the execution of cooling-off rights by policyowners of the policies. AIA will reserve the right to retract the reward based on the result and any substantiated violations of required sales conduct.
2. Eligibility to attend the Training Programme is not transferrable. All privileges and awards of related Training Programme are not transferrable and cannot be exchanged for cash.
3. Financial Planners and Agency Leaders must hold valid contracts at the time of Training Programme.
4. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability at any time without prior notice.
5. In the event of dispute, AIA's decision is final and conclusive.

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