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Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)	From:	Winnie Fung
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Executives / IVS Executives / Contact Centre	Dept:	Corporate Solutions
Date:	01 June 2026	Total pages:	4 + Appendix

Subject: **(A260617) 2026 Q2 IVS「友得揀」客戶尊屬優惠 [優惠及客戶資格更新 (6 月)]**
2026 Q2 IVS Exclusive Customer Offer [Offer & Customer Eligibility Update (June)]

2026 Q2 IVS「友得揀」客戶**尊屬優惠**及**客戶資格**現已更新！隨著**「財富盈活儲蓄保險計劃」**於今天（首個申請日）正式接受申請，此計劃已納入推廣活動中。同時，**「環宇盈活儲蓄保險計劃」**及**「盈御多元貨幣計劃 3」**的優惠亦已更新。請細閱以下之更新摘要，把握 IVS 推廣良機！

推廣期	**2026 年 6 月 1 日至 6 月 30 日**	
客戶資格更新詳情*	▪ 於 **2026 年 5 月 31 日**及投保時為現有友邦強積金^ / 退休金@成員；或 ▪ 投保時為現有友邦團體保險成員	
優惠更新詳情	▪ 投保**「財富盈活儲蓄保險計劃」**、**「環宇盈活儲蓄保險計劃」**或 **「盈御多元貨幣計劃 3」** 可享**高達 36% 保費回贈** ▪ 投保**「財富盈活儲蓄保險計劃」(5 年保費繳付期) 及下列指定保險計劃**並符合有關優惠條款及細則，下列指定保險計劃將可獲得其相關之**額外優惠**。 - 「活然人生」保險計劃 - 「愛伴航」保險計劃 2 - 「簡繳•愛伴航」保險計劃 - 指定醫療保障計劃 有關詳情，請參閱以下宣傳單張。	
宣傳單張版本及其他資料	 繁體中文版本：連結 英文版本：連結 簡體中文版本：連結	有關 IVS 客戶最新尊屬優惠與標準優惠之比較，請參閱 **附件 1 – 產品優惠比較一覽表**（只供內部參考）

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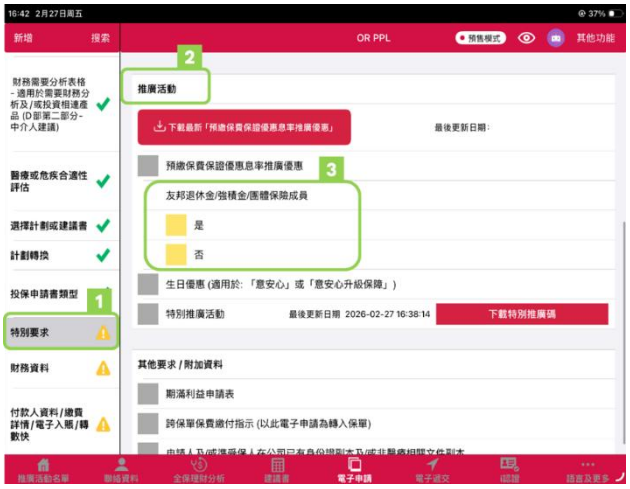
重要提示	**由即日起，財務策劃顧問經 iPoS 為客戶投保時，請注意「特別要求 > 推廣活動」內關於「投保人是否為友邦退休金/強積金/團體保險成員」之欄位，已更新為必填項目。請於投保時務必選取相關選項。**  **根據友邦保險個人資料收集聲明（PICS），有關友邦保險集團公司在提供任何強積金及公積金相關服務時收集的任何個人資料，該等個人資料只會用於推廣或營銷任何強積金及公積金產品或服務。強積金及公積金客戶的資料是分別用作提供相關強積金或公積金的服務。請注意（一）不應該向其他人士披露客戶的資料作非強積金或公積金職能用途；（二）不應該將客戶的資料用於交叉銷售任何強積金或公積金計劃以外的產品或服務。** **不可直接或間接向客戶提供任何禮物及優待誘使客戶加入友邦強積金及購買友邦保險產品。**

備註：

^只適用於香港。

*若客戶最終未能通過資格審核，客戶只可享 AIA 推廣活動的標準優惠。有關標準優惠詳情，請參閱宣傳單張。

@包括澳門友邦保險退休金僱主計劃（澳門私人退休金計劃和非強制性中央公積金計劃）及非強制性中央公積金個人計劃 。

如有任何查詢，請使用 iEngage/PES Chatbot 或與 IVS 團隊聯絡。

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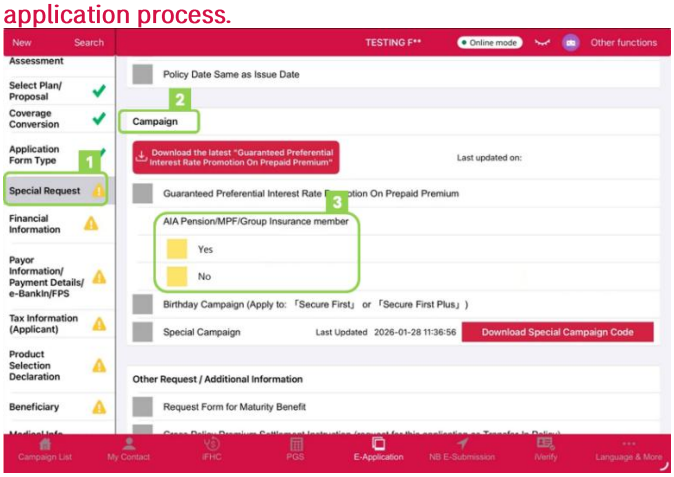
2026 Q2 IVS Exclusive Customer Offer and Eligibility have been updated! Following the launch of Wealth Flexi Savings Insurance Plan today (first application date), it has been included in the promotional campaign. At the same time, the offers for GlobalFlexi Savings Insurance Plan and Global Power Multi-Currency Plan 3 are also updated. Please refer to the summary below for the details of the update and seize the IVS promotion opportunity!

Promotion Period	1- 30 June 2026
Customer Eligibility Update Details*	▪ Existing AIA MPF^/Pension@ members on 31 May 2026 and at the time of application; or ▪ Existing AIA Group Insurance members at the time of application
Offer Update Details	▪ Apply Wealth Flexi Savings Insurance Plan, GlobalFlexi Savings Insurance Plan or Global Power Multi-Currency Plan 3 can enjoy up to 36% premium refund ▪ Apply for Wealth Flexi Savings Insurance Plan (5-year premium payment term) and the following specified insurance plans and meet respective offer terms and conditions, the following specified insurance plans will entitle to its respective Extra Offer. - ProsperLife Insurance Plan - On Your Side Insurance Plan 2 - Essence – On Your Side Insurance Plan - Specified Medical Insurance Plans For details, please refer to the promotion leaflet below.
Promotion Leaflet Version and Other Information	 Traditional Chinese Version: LINK English Version: LINK Simplified Chinese Version: LINK For comparison of the latest IVS Exclusive Customer Offer and the public offer, please refer to Appendix 1 - Product Offer Comparison Table (For internal use only)
Important Note	Effective immediately, when Financial Planners submit applications for customers via iPoS, please note that the field "Whether the applicant is a member of AIA Pension / MPF / Group Insurance" under "Special Request > Campaign" has been updated to a mandatory requirement. Please ensure this section is completed during the application process. 

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	According to AIA Personal Information Collection Statement (PICS), in relation to any personal data collected by AIA whilst providing any services in respect of our mandatory provident fund scheme ("MPF") and occupational retirement schemes ("ORSO"), such personal data would only be used for promoting or marketing any MPF and / or ORSO products or services. Such information obtained is used for performing MPF and / or ORSO functions. Please note that you (a) must not disclose such information to any other person for performing non-MPF and / or non-ORSO functions; (b) must not cross-selling non-MPF and / or non-ORSO products or services by accessing such information. Must not directly or indirectly offer any gifts and incentives to induce customers to join AIA MPF scheme and purchase AIA insurance products.

Remarks:

^Applicable to Hong Kong only.

*If the eligibility checking cannot be passed, customer will only be entitled to the standard offer in AIA Promotion Campaign. For details of the standard offer, please refer to the promotion leaflet.

©Including AIA Macau Pension Employer Scheme (Macau Private Pension Schemes and Non-Mandatory Central Provident Fund Scheme) and Non-Mandatory Central Provident Fund Individual Scheme.

Should you have any question, please enquire by using iChat in iEngage/PES, or contact our IVS Team for enquiry.

Yours faithfully,

Winnie Fung
Head of Individual Voluntary Solutions
CS – Individual Voluntary Solutions

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附件 1：產品優惠比較一覽表

類別	產品	IVS 優惠 Vs 標準優惠 是否可享更高回贈
AIA 自願醫保計劃	AIA 自願醫保標準計劃#@ AIA 自願醫保靈活計劃#@ AIA 自願醫保尊耀計劃#@ AIA 自願醫保睿選計劃#@	✓ **+1 個月**保費回贈
醫療保障	「尊耀」醫療計劃@^ 「尊耀明珠」醫療計劃@ 「睿選」醫療計劃@^ 「睿選明珠」醫療計劃@	✓ **+1 個月**保費回贈
危疾保障	「愛伴航」保險計劃 2 系列*¶ 「簡緻 • 愛伴航」保險計劃*	✗

只適用於香港。有關完整產品資料，請參閱 aia.com.hk。
@ 可以基本計劃形式獨立投保或作附加契約。
* 只可以基本計劃形式投保。
^ 只適用於澳門。
¶「愛伴航」保險計劃 2 系列包括： i.「愛伴航」保險計劃 2； ii.「愛伴航 – 首護摯寶」保險計劃 2。

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附件 1：產品優惠比較一覽表（續）

類別	產品	保費繳付期 / 最低保費要求	IVS 優惠 Vs 標準優惠 是否可享更高回贈
儲蓄保險	「盈御多元貨幣計劃 3」*■~（更新） 「簡愛 • 延續」保障計劃 5*~	5 / 10 年	✓ +2% 保費回贈
	環宇盈活儲蓄保險計劃*μ~（更新） 財富盈活儲蓄保險計劃*μ~（新增）	5 年	✓ +2% 保費回贈
	「盈御多元貨幣計劃 3」* 環宇盈活儲蓄保險計劃* 「簡愛 • 延續」保障計劃 5*π 財富盈活儲蓄保險計劃*μ~（新增）	一次性繳付保費	✗
人壽保險	「活然人生」保險計劃*	5 / 30 年	✓ +2% 保費回贈
定期壽險附加契約	摯誠定期壽險附加契約@ 尊誠定期壽險附加契約@	-	✗

* 只可以基本計劃形式投保。

■ 適用於所有貨幣之保單（即人民幣、英鎊、美元、澳元、加元、港元、澳門幣（只適用於澳門繕發的保單）、歐元及新加坡元）。

~ 若保單以美元以外的貨幣繕發，請參閱宣傳單張內之條款及細則 12 及 13 有關其他貨幣適用之保費金額。

μ 適用於以下貨幣（即美元、港元、澳門幣（只適用於澳門繕發的保單））。

@ 只可以作附加契約。

π 若保單以美元以外的貨幣繕發，請參閱條款及細則 17 有關其他貨幣適用之保費金額。

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Appendix 1：Product Offer Comparison Table

Category	Products	IVS Offer Vs Standard Offer Is it better?
AIA Voluntary Health Insurance Scheme	AIA Voluntary Health Insurance Standard Scheme#@ AIA Voluntary Health Insurance Flexi Scheme#@ AIA Voluntary Health Insurance Privilege Ultra Scheme#@ AIA Voluntary Health Insurance SelectWise Scheme#@	✓ +1 Month Premium Refund
Medical Protection	Privilege Ultra Medical Plan@^ Privilege Ultra Pearl Medical Plan@ SelectWise Medical Plan@^ SelectWise Pearl Medical Plan@	✓ +1 Month Premium Refund
Critical Illness Protection	On Your Side Insurance Plan 2 Series*¶ Essence – On Your Side Insurance Plan*	✗

Available in Hong Kong only. For complete product information, please refer to aia.com.hk.
@ Can be purchased as a basic plan or as a rider.
* Can only be purchased as a basic plan.
^ Available in Macau only.
¶ On Your Side Insurance Plan 2 Series includes: i. On Your Side Insurance Plan 2; ii. On Your Side Insurance Plan 2 – First Gift.

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Appendix 1：Product Offer Comparison Table (Cont.)

Category	Products	Premium payment period/ Min. premium requirements	IVS Offer Vs Standard Offer Is it better?
Savings Insurance	Global Power Multi-Currency Plan 3*■~ (Updated) Simply Love Encore 5*~	5 / 10-year	✓ +2% Premium Refund
	GlobalFlexi Savings Insurance Plan*μ~(Updated) Wealth Flexi Savings Insurance Plan*μ~(New)	5-year	✓ +2% Premium Refund
	Global Power Multi-Currency Plan 3* GlobalFlexi Savings Insurance Plan* Simply Love Encore 5*π Wealth Flexi Savings Insurance Plan*μ~(New)	One-Time Premium Payment	✗
Life Insurance	ProsperLife Insurance Plan*	5 / 30-year	✓ +2% Premium Refund
Term Life Supplementary Contract	Wisdom Term Life Supplementary Contract@ Expert Term Life Supplementary Contract@	-	✗

* Can only be purchased as a basic plan.

■ Applicable to all currencies available for policies, i.e. Renminbi (RMB), British pound sterling (GBP), US dollar (US$), Australian dollar (AUD), Canadian dollar (CAD), HK dollar (HK$), Macau pataca (MOP; only for policies issued in Macau), Euro (EUR) and Singapore dollar (SGD).

~ If the policy is issued in a currency other than US$, please refer to 12 and 13 under Terms & Conditions in the promotion leaflet for the applicable premium amount in other currencies.

μ Applicable to the following currencies available for policies, i.e. US dollar (US$), HK dollar (HK$), Macau pataca (MOP; only for policies issued in Macau).

@ Can only be purchased as a rider.

π If the policy is issued in a currency other than US$, please refer to 17 under Terms & Conditions for the applicable premium amount in other currencies.

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