友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs/ SDDs/ DDs / MICs / Agency Leaders / Financial Planners (Hong Kong)	From:	Winnie Fung
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Agency Executives / CS IVS Executives	Dept:	Corporate Solutions
Date:	23 June 2026	Total pages:	6

Subject (A260642) **團體醫療保險 x IVS 業務獎賞 — 財務策劃顧問「夏日好禮 3 重賞」**
Group Medical Insurance x IVS Business Rewards — "Summer's Triple Treat" for Financial Planners

企業業務誠意推出**「夏日好禮 3 重賞」**推廣活動，鼓勵財務策劃顧問積極聯絡其**中小企團體醫療保險保單客戶**，透過安排職場活動[2]創造機會，接觸團體醫療保險成員，**拓展 IVS 銷售機遇**。

推廣期	2026 年 6 月 1 日 至 9 月 30 日
參加資格	擁有中小企團體醫療保險保單之財務策劃顧問（香港）
合資格中小企團體醫療保險保單 **（「合資格團險保單」）**	於香港生效之團體醫療保險保單，並於投保及 / 或最新保單週年日時擁有 3 至 20 名全職僱員： a) 新團體醫療保險保單：保單生效日為2026 年 6 月 1 日至 8 月 31 日；或 b) 現有團體醫療保險保單：保單續保日為2026 年 6 月 1 日至 8 月 31 日
財務策劃顧問獎賞	**獎賞 1：預約見面好禮** [2] **要求：財務策劃顧問成功預約及安排每間合資格團險保單客戶舉辦職場活動** **獎賞：**HKD 50 餅卡 2 張（數量有限，先到先得，送完即止） **獎賞 2：活動留影抽獎** [3] **要求：財務策劃顧問遞交獎賞1之職場活動日打卡相片 1 張，即可參加抽獎** **獎賞：**有機會贏取高達 HKD 1,000 超市現金券 大獎 HKD 1,000 超市現金券 （1名） 二獎 HKD 600 超市現金券 （2名） 三獎 HKD 400 超市現金券 （7名） **獎賞 3：IVS 啟動獎** [4] **要求：成功為合資格團險保單客戶之成員繕發 2 張 IVS「友得揀」保單** **獎賞：**AIA CS 流動電源 1個
合資格團險保單名單發放安排	推廣期內，相關財務策劃顧問將會收到電郵通知合資格之團險保單名單（或跟進提醒，如適用），敬請密切留意。

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一般規則及要求：

1) 合資格中小企團體醫療保險保單客戶(“合資格團險保單客戶”)：

合資格團險保單客戶名單將於推廣期內，每月中透過指定電郵（「電郵」）發送予相關財務策劃顧問。電郵內將附有專屬連結，以供財務策劃顧問登記「獎賞 1：預約見面好禮」及提交「獎賞 2：活動留影抽獎」之相片。如該保單有多於一位財務策劃顧問，電郵將只會發送至系統紀錄中的首位財務策劃顧問。

2) 「獎賞 1：預約見面好禮」登記及禮品發放安排 ：

A. 職場活動是指財務策劃顧問為其合資格團險保單客戶（包括僱主、人力資源部及計劃成員），於推廣期內成功安排及舉辦之活動並必須為以下兩種形式之一：

i) 員工簡介會： 由財務策劃顧問向成員講解現有團體醫療保障內容、理賠流程，並藉此介紹「僱員（個人）自選保障系列（EVS）」產品之最新資訊及專屬優惠等。

ii) 服務台： 於合資格團險保單客戶之辦公地點解答成員提問、協助成員下載及登入「AIA+」手機應用程式、檢視個人保障缺口等。

B. 財務策劃顧問必須於推廣期內，成功預約合資格團險保單客戶，並為有關客戶及成員舉行職場活動。

C. 財務策劃顧問須於成功與合資格團險保單客戶預約職場活動後，經電郵附上之專屬連結，填寫並遞交禮品兌換表格。

D. 財務策劃顧問可憑每間成功安排活動的合資格團險保單客戶獲得 2 張 HKD 50 餅卡。名額 300 份，先到先得，送完即止。

E. 每間合資格團險保單客戶只限登記一次。

3) 「獎賞 2：活動留影抽獎」：

A. 相片要求： 財務策劃顧問必須提交清楚顯示活動現場之真實照片以參加抽獎。每成功提交一間合資格團險保單客戶公司之活動相片可獲一次抽獎機會。照片必須透過指定電郵（上述第 1 項）附上的專屬連結上載。不接受其他遞交渠道。

B. 抽獎日期及結果公佈： 得獎者將於推廣期完結後由電腦系統隨機抽出，結果將於 2026 年 10 月公佈。

4) 「獎賞 3：IVS 啟動獎」：

A. 財務策劃顧問於「推廣期」內，為其合資格團險保單客戶之成員成功繕發最少 2 張 IVS「友得揀」保單，即合資格獲取「IVS 啟動獎」。

B. 合資格 IVS「友得揀」保單定義及要求

a) IVS 保單只計算：

i) 企業業務成員以保單持有人或受保人身份經以下途徑購買之全新個人保單或指定保單（包括：「友心意」醫療保障計劃、「友愛護」癌症保障計劃及「意安心升級保障」）：

- 強積金 / 退休金個人賬戶成員：經現有強積金 / 退休金個人帳戶之財務策劃顧問購買。
- 強積金 / 退休金企業成員：經現有負責該強積金 / 退休金企業帳戶之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買。
- 團體保險計劃成員：經現有負責該團體保險計劃之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買。

而且此企業業務成員 (i) 於投保前上一個日曆月的最後一天、於投保及保單繕發時應為現有友邦強積金 / 退休金成員；或 (ii) 於投保及簽發保單時應為現有友邦團體保險成員。

ii) (只限香港)在職公務員及政府聘用的非公務員（包括立法會秘書處及房屋委員會之員工）及其家屬[Δ]（配偶及子女）以保單持有人或受保人身份經任何財務策劃顧問購買指定 AIA 自願醫保計劃。

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Δ「家屬」指有關人員的配偶及未滿 21 歲的未婚子女（包括父母已離婚 / 依法分居子女、繼子女、領養子女及非婚生子女）。如果子女是 19 或 20 歲，則必須正在接受全時間教育或全時間職業訓練，或由於身體衰弱或精神欠妥而倚賴有關人員供養。

b) 合資格 IVS 保單只計算於推廣期內經 iPoS 遞交及獲繕發之保單。
c) 若營業同事於競賽期之前已遞交相關保單 / 相關保單已獲繕發，並於推廣期內撤回投保申請 / 取消相關保單，其後再次投保相同產品計劃，相關保單數目將不獲計算。
d) 所有由現有保單轉換 / 退保後由同一受保人或同一持有人持有之保單的保單數目將不獲計算。
e) 若保單由兩位營業同事共同完成，相關保單數目將按比例平均分配，而保單數目不會以四捨五入方式計算。
f) 同一受保人於推廣期內投保同一基本計劃及同一保費繳付年期之所有新保單，將以一張保單計算。
g) 營業同事遞交保單申請予 AIA，應預留充足時間遞交以確保有關申請於競賽期內獲繕發。
h) 營業同事進行銷售時必須根據客戶的需要及保費負擔能力作評估，從而介紹適合的保險產品，不得因獎賞而對客戶作特定銷售建議。
i) 結果以保單冷靜期後作調整為準。AIA 保留就調整後之排名結果及就任何違規銷售行為追討已發放獎賞之權利。

5) AIA 並非獎品之供應商，故不會承擔有關獎品供應和品質的任何責任。由獎品引起的任何爭議均由參加者和供應商直接解決。獎品之使用受限於供應商規定的條款和細則。
6) 獎賞不得轉讓或轉換成現金。得獎者必需於獎賞發放時仍與公司維持有效合約關係。
7) AIA 保留隨時修改本推廣規則或獎賞之權利（例如獎品有機會以現金形式發放），恕不另行通知。
8) 如有任何爭議，AIA 保留最終決定權。

如有任何查詢，歡迎與負責貴區之企業業務營業拓展部同事 / IVS 團隊聯絡。

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Corporate Solutions proudly launches the "Summer's Triple Treat" promotional campaign to encourage financial planners to proactively contact their Small and Medium Enterprises (SME) Group Medical Insurance Corporate Customers. By organizing worksite activities[2], this initiative aims to create opportunities to engage with group medical insurance members and expand IVS sales opportunities.

Promotion Period	1 June – 30 September 2026
Eligibility	Financial Planners (Hong Kong) who hold SME Group Medical Insurance Policies
Eligible SME Group Medical Insurance Policy ("Eligible Group Insurance Policy")	Group medical insurance policies in force in Hong Kong with 3 to 20 full-time employees at the time of application and/or the latest policy anniversary: a) New Group Medical Insurance Policies: Policy effective date falls between 1 June 2026 and 31 August 2026; or b) Existing Group Medical Insurance Policies: Policy renewal date falls between 1 June 2026 and 31 August 2026
Rewards	**Reward 1: Meet & Greet Reward [2]** **Requirement: Financial Planners successfully book and arrange a worksite activity for each Eligible Group Insurance Policy Customer** **Reward:** 2 x HKD 50 Bakery Vouchers (Limited quantity, first-come first-served, while stocks last) **Reward 2: Activity Photo Lucky Draw [3]** **Requirement: Financial Planners submit 1 on-site photo taken during the worksite activity under Reward 1 to enter the lucky draw** **Reward: A chance to win up to HKD 1,000 in Supermarket Cash Coupon** Grand Prize — HKD 1,000 Supermarket Cash Coupon — (1 Winner) Second Prize — HKD 600 Supermarket Cash Coupon — (2 Winners) Third Prize — HKD 400 Supermarket Cash Coupon — (7 Winners) **Reward 3: IVS Activation Award [4]** **Requirement: Successfully issue 2 IVS policies for members of Eligible Group Insurance Policy Customer** **Reward:** 1 x AIA CS Power Bank
Eligible Group Policy List Distribution Arrangements	During the Promotion Period, the relevant Financial Planners will receive email notifications regarding the list of eligible Group Insurance policies (or follow-up reminders, where applicable). Please stay tuned.

General Rules and Requirements:

1) Eligible SME Group Medical Insurance Policyholder Customer("Eligible Group Insurance Policy Customer"):
   During the Promotion Period, lists of Eligible Group Insurance Policy Customers will be sent to the relevant Financial Planners via designated email ("Email") around the middle of each month. The Email will contain an exclusive link for Financial Planners to register for the "Reward 1: Meet & Greet Reward" and to submit photos for the "Reward 2: Activity Photo Lucky Draw". If a policy has more than one Financial Planner, the Email will only be sent to the primary Financial Planner listed first in the system records.
2) Registration and Gift Distribution Arrangements for "Reward 1: Meet & Greet Reward":
   A. Worksite Activities refer to events successfully arranged and held by the Financial Planners for their Eligible Group Insurance Policy Customers (including employers, HR departments, and scheme members). It must be in one of the following two formats:
      i) Member Briefing: Financial Planners explain the existing group medical benefits and claims procedures to members, and take the opportunity to introduce the latest information and exclusive offers for the EVS products, etc.
      ii) Helpdesk: Set up a dedicated service booth at the Eligible Group Insurance Policy Customers' office to proactively answer member inquiries, assist members in downloading and logging into the "AIA+" mobile app, and review individual protection gaps, etc.
   B. Financial Planners must successfully book worksite activities with Eligible Group Insurance Policy Customers and hold the events for the relevant customers and members during the Promotion Period.

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C. After successfully booking a worksite activity with an Eligible Group Insurance Policy Customer, Financial Planners must complete and submit the gift redemption form via the exclusive link provided in the Email.
D. Financial Planners can receive 2 x HKD 50 Bakery vouchers for each Eligible Group Insurance Policy Customers with whom they have successfully arranged an activity. The quota is limited to 300 sets and will be distributed on a first-come, first-served basis while stocks last.
E. Each Eligible Group Insurance Policy Customers can only be registered once.

3) "Reward 2: Activity Photo Lucky Draw":
   A. Photo Requirements: Financial Planners must submit authentic photos that clearly show the event venue to enter the lucky draw. Each successful submission of event photos for one Eligible Group Insurance Policy Customer will earn one lucky draw chance. Photos must be uploaded via the exclusive link provided in the designated email (as mentioned in Section 1 above). No other submission channels will be accepted.
   B. Lucky Draw Date and Announcement of Results: Winners will be randomly drawn by a computer system after the Promotion Period ends, and the results will be announced in October 2026.
4) "Reward 3: IVS Activation Award":
   A. Financial Planners who successfully issue a minimum of 2 IVS policies for members of their Eligible Group Insurance Policy Customers within the Promotion Period will qualify for the "IVS Activation Award".
   B. Definition and Requirements of Eligible IVS Policies
      a) IVS policy is qualified only if:
         i) Corporate Solutions members purchase a new personal insurance policy or designated policy (including StepUp Medical Protection Plan 2, Shield Up Cancer Protection Plan and Secure First Plus) as policyholder or insured through the following channels:
            - MPF/pension personal account members: Purchase through the existing Financial Planner of the MPF/pension personal account.
            - MPF/Pension corporate members: Purchase through the existing Financial Planner currently responsible for the MPF/Pension corporate account, or assigned Financial Planner of the same agency unit.
            - Group insurance plan members: Purchase through the existing Financial Planner currently responsible for the group insurance account, or assigned Financial Planner of the same agency unit.

            And such Corporate Solutions member should be (i) an existing AIA MPF/Pension member on the last day of previous calendar month upon application, at the time of application and policy issuance; or (ii) an existing AIA Group Insurance member at the time of application and policy issuance.
         ii) (For Hong Kong only) Serving civil servants and non-civil servants employed by the Government (including staff members of Legislative Council Secretariat and Housing Authority) and their families[Δ] (spouse and children) purchase a specified AIA Voluntary Health Insurance Scheme as policyholder or insured through any financial planner.

            [Δ] "Family" means the officer's spouse and children (including children of divorced/legally separated officers, step-children, adopted children and illegitimate children) who are unmarried and under the age of 21. In the case of children aged 19 or 20, they must also be in full time education or in full time vocational training, or dependent on the officer as a result of physical or mental infirmity.
      b) Eligible IVS policies will only be counted if they are submitted via iPoS and issued within the Promotion Period.
      c) Financial Planners who have submitted policies/policies issued before the Promotion Period and then reapply for the same products with the same insured, the corresponding policies will NOT be counted.
      d) The relevant policy count of policy changed/lapsed from existing policies of the same policyholder or insured will NOT be counted.
      e) If the policy is jointly completed by two or more Financial Planners, the relevant Policy Count will be evenly shared in proportion while Policy Count will not be rounded-up.
      f) All new policies purchased under the same insured for the same basic plan and same premium payment period during the Promotion Period will be counted as one policy.
      g) For policy applications submitted to AIA, Financial Planners are reminded to allow sufficient time to submit the application to ensure the policy is issued within the Promotion Period.
      h) Financial Planners should make product recommendation based on customer needs and affordability and should not make any incentive-driven recommendation to customers.
      i) The results are subject to adjustments after the policy cooling-off period. AIA reserves the right to retract the rewards based on the adjusted ranking results and any substantiated violation of sales conduct.

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5) AIA is not the supplier of the prizes and shall bear no liability or responsibility for the supply and quality of such prizes. Any disputes arising from the prizes shall be resolved directly between the participants and the supplier. The use of the prizes is subject to the terms and conditions prescribed by the supplier.
6) Rewards are non-transferrable and cannot be exchanged for cash. The winners must be in-force with AIA at the time of reward distribution in order to attend the celebration event.
7) AIA reserves the right to amend the rules or rewards of these contests at any time without prior notice (for example, rewards may be distributed in cash-in-lieu).
8) In case of any disputes, AIA reserves the right for any final decision.

If you have any questions, please contact your designated CSBD Agency executives/IVS Team.

Yours faithfully,

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

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