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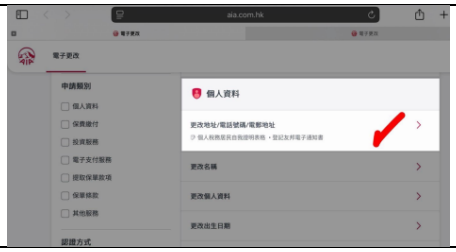
Memo

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	**From:**	Angela Yeung
		Dept:	Customer and Marketing
Copy:	Ms. Melissa Wong All Department Heads Macau CEO / ABDD Executives	**Total pages:**	8
Date:	1 July 2026		

Subject **A260713** **2026 年第 3 季【見面「友」禮】活動**
2026 Q3 Meet-and-Greet Delights

與特選客戶見面，客戶可享 AIA 友 Point 自由兌換心水商戶禮券

【見面「友」禮】活動 (2026 年第 3 季)

活動期	2026 年 7 月 1 日至 2026 年 9 月 30 日 (包括首尾兩天)
特選客戶	以下CRM特選客戶名單均適用 (附錄2)： • [Recapture] 2026 年 7-9 月重點客戶名單 • [Recapture] 2025 年重點客戶名單 • 2026 年高端客戶名單 (7-9 月) • [優易/簡易核保] 2026 年重點客戶名單 (7-9 月) • 2026 年高購買潛力客戶名單 (7-9 月) • [Activation] 2026 年高購買潛力單一保單客戶 (7-9 月) 或參閱**總名單**： • **2026【見面「友」禮】特選客戶名單**
見面禮遇資格	以上特選客戶於活動期內與財務策劃顧問見面，兼**透過 iChange 成功更新或再確認**現仍有效的**地址 / 電話號碼 / 電郵地址**，即可享以下見面禮遇。 
見面禮遇	合資格客戶將可享以下禮遇一份 (「見面禮遇」)： **27,500 AIA友Point** 客戶可於 AIA+兌換心水商戶購物禮券 (約值港元/澳門幣 110 或人民幣 100) 按此參閱客戶宣傳單張

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	• 每位合資格客戶只可於 2026 年度獲贈見面禮遇 1 次。 • 見面禮遇將於 iChange 記錄後的 8 星期內直接發放予合資格特選客戶之 AIA+賬戶內。財務策劃顧問須提醒客戶**於 AIA+成功連結個人保單** (附錄 3)，以作見面禮遇派發安排；**否則，見面禮遇資格或將被取消。** • 活動受條款及細則約束，詳情請參閱附錄 1。
備註	• 此活動只適用於特選客戶。財務策劃顧問於分享有關資訊予客戶前，須查閱特選客戶名單 (附錄 2)。 • 發放此見面禮遇並不涉及任何新保單之銷售或購買。 • 特選客戶須合符上述資格以享有見面禮遇。如特選客戶符合其他推廣活動，但未有符合上述資格，均不會獲發見面禮遇。 • **請注意：** a. 所有銷售活動及投保申請必須在香港或澳門境內進行，取決於你所屬營業牌照。 b. 如欲邀請特選客戶進行指定財務分析，請先確認對方身處你所屬營業牌照的境內。 c. 營業員必須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及與抵港抵澳內地人士相關的工作指引。 d. 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。若特選客戶為 Opt-out 客戶，財務策劃顧問不應以此禮遇作為邀約或更新客戶資料的原因。

活動期有限，請與客人保持聯繫，深化客戶關係！

如有任何疑問，請電郵至客戶及市場策劃 (Customer and Marketing) AIAHK.CustomerExperience-ECM@aia.com

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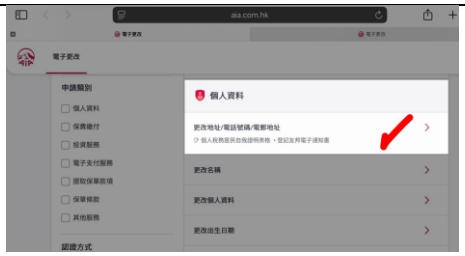
Meet and greet your customers with their chosen offer from AIA Points!

Meet-and-Greet Delights (Quarter 3 2026)

Campaign Period	From 1 July 2026 to 30 September 2026 (both dates inclusive)
Selected Customers	CRM selected customer lists below are eligible (Appendix 2 for details): • (Recapture) 2026 Jul-Sep Selected Customers • (Recapture) 2025 Selected Customers • 2026 High-value Customers (Jul-Sep) • 2026 High propensity Customers (Jul-Sep) • (Simplified/Preferential UW) 2026 Selected Customers (Jul-Sep) • (Activation) 2026 High propensity Single-policy-holding Customers (Jul-Sep) Or refer to the **master list**: • **2026 Selected Meet-and-Greet Customers**
Offer Eligibility	The above selected customers who meet with their financial planners, and successfully **update or reconfirm** their existing valid **address / phone numbers / email addresses** via **iChange** during the Campaign Period, will be qualified to enjoy the Offer! 
Offer	• Each qualified customer will receive the offer below ("Offer"): **27,500 AIA Points** Customers can redeem a variety of merchant gift vouchers valued at approximately HKD/MOP110 or RMB 100 on AIA+. **Click here for the promotional leaflet** • Each qualified customer can receive the Offer once only during 2026. • The Offer will be credited directly to the qualified customers' AIA+ account within 8 weeks after the corresponding iChange record is recieved. Financial planners must remind customers to successfully **link their individual policies in AIA+** (Appendix 3) for the Offer distribution. **Failure to link the policies may result in forfeiture of the Offer.** • Terms & conditions apply. Please refer to Appendix 1 for details.

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Remarks	• This campaign is only applicable to the selected customers. Financial Planners must check the selected customer list (Appendix 2) before sharing any campaign details. • Distribution of the Offer does not involve any new policy sales or purchases. • The selected customers must fulfill the above criteria to enjoy the Offer. If they qualify for other promotion(s) but do not meet the above criteria, they will not be eligible for the Offer. • **Note:** a. All solicitation activities and insurance application must be conducted in Hong Kong or Macau territory ("Territory"), depending on the territory covered by your intermediary license. b. Before inviting selected customers to conduct designated financial analysis, please confirm that they are physically located within the Territory covered by your intermediary license. c. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants/Policyowner From MCV Business" and MCV related guidelines. d. Before contacting the policyholder, please check whether the policyholder is on the opt-out list. If the customer has opted out, financial planners must refrain from using the Offer as a reason to invite them for a meetup or to update their contact information.

Limited-time customer activity! Please stay connected with your customers!
Should you have any queries, please email Customer and Marketing at AIAHK.CustomerExperience-ECM@aia.com

Best regards,



Angela Yeung
Head of Customer Value Growth and Digital & Design Experience
Customer & Marketing

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附錄 1：【見面「友」禮】活動 (2026 年第 3 季) — 條款及細則

1. 此活動期由 2026 年 7 月 1 日至 2026 年 9 月 30 日止 (包括首尾兩天)；並以 iChange 遞交的確認紀錄 (香港時間及 AIA 之伺服器接收的時間) 作準。
2. 此活動只適用於 AIA 特選保單持有人(「特選客戶」)。
3. 於活動期內，如特選客戶與財務策劃顧問見面，並透過 iChange 成功更新或確認現仍有效的通訊資料(地址 / 電話號碼 / 電郵地址)，該特選客戶 (「合資格客戶」) 將獲贈 27,500 AIA 友 Point (「見面禮遇」)，客戶可於 AIA+兌換約值港元/澳門幣 110 或人民幣 100 之商戶購物禮券 。AIA 有權隨時更改 AIA+內的禮券商戶選項而無須另行通知，禮品或會以其他商戶之同等價值禮券替代。
4. 每位合資格客戶只可於 2026 年度獲贈見面禮遇最多 1 次，而此限制適用於 2026 年度內所有提供見面禮遇的【見面「友」禮】活動。
5. 見面禮遇將於 iChange 記錄後的 8 星期內直接發放予合資格客戶之 AIA+手機應用程式的賬戶內。合資格客戶須於 AIA+手機應用程式成功連結個人保單，以作見面禮遇派發安排；否則，見面禮遇資格或將被取消。
6. 發放此見面禮遇並不涉及任何新保單之銷售或購買。
7. 特選客戶須符合見面禮遇資格以享有見面禮遇。如特選客戶符合其他推廣活動，但未有符合見面禮遇資格，均不會獲發見面禮遇。
8. AIA 並非商戶購物禮券的製造 / 供應商並不就禮品承擔任何義務和責任。由商戶購物禮券引起的任何爭議均由參加者和製造商 / 供應商直接解決。商戶購物禮券之使用受限於條款和細則，有關商戶購物禮券使用詳情，請參閱其條款及細則。
9. AIA 有權隨時更改本推廣活動的條款及細則而無須另行通知。如對本推廣活動有任何爭議，AIA 保留最終決定權。
10. 如此條款及細則之中文及英文版本存有歧異，以英文版本為準。
11. 本條款及細則受香港法律管轄並按其解釋。香港法院對於任何因本條款及細則所引發的爭議享有獨有的司法管轄權。
12. 「AIA」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）之香港及/或澳門分行。「香港」及「澳門」分別指「香港特別行政區」及「澳門特別行政區」。

其他注意事項：

1. 財務策劃顧問不應以此禮遇作為客戶投保之誘因，及影響客戶作出知情的投保決定。財務策劃顧問向客戶推介產品前須進行財務需要分析，以評估客戶的需要及承擔能力。客戶須根據自己的需要及承擔能力以決定保費。
2. 香港及澳門財務策劃顧問只能於所屬營業牌照境內進行受規管活動。所有銷售活動及投保申請必須在香港及澳門境內進行。財務策劃顧問須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及與抵港抵澳內地人士相關的工作指引。
3. 於接觸客戶前，請您必須檢查客戶是否已同意使用其個人資料用作直接促銷。如否，請勿在獲取客戶明確同意前進行直接促銷(包括促銷推廣活動之電子訊息) 。

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Appendix 1: Terms & Conditions of【Meet-and-Greet Delights】Campaign (Quarter 3 2026)

1. The period of this campaign is from 1 July 2026 to 30 September 2026, both dates inclusive. Eligibility is determined based on the confirmation record submitted via iChange, using Hong Kong time and the timestamp recorded by AIA's server.
2. This campaign is only applicable to the selected policyholders of AIA ("Selected Customers").
3. During the campaign period, if the Selected Customers meet with their financial planners, and successfully update or reconfirm their existing valid contact information (address / phone numbers / email addresses) via iChange, they ("Qualified Customers") will be eligible to receive 27,500 AIA Points ("Offer"), which can be redeemed for a variety of merchant gift vouchers valued at approximately HKD/MOP110 or RMB 100 on AIA+. AIA reserves the right to change voucher merchant options without advance notices and the Offer may be substituted with a voucher of equivalent value from another merchant.
4. Each Qualified Customer can receive the Offer once only during 2026, and this limitation applies across all【Meet-and-Greet Delights】campaigns in which the Offer is featured throughout 2026.
5. The Offer will be sent to AIA+ account of the Qualified Customers within eight (8) weeks after AIA receives the iChange record. Qualified Customers must link their individual policies in AIA+ mobile app for Offer distribution purpose. Failure to link policies may result in forfeiture of the Offer.
6. The distribution of the Offer is not related to the sale or purchase of any new insurance policy.
7. Selected Customers must meet the eligibility criteria to receive the Offer. Selected Customers who qualify for other promotion(s) but do not fulfill the criteria of the Offer will not be eligible.
8. AIA is not the suppliers of the merchant gift vouchers, and shall have no obligation and liability in any issues that arise from the merchant gift vouchers. Any disputes arising therefrom shall be resolved between the merchant and the customers directly. The use of the merchant gift voucher is subject to terms and conditions. For details of how to use the vouchers, please refer to the relevant terms and conditions.
9. AIA reserves the right to change any terms and conditions of this campaign without advance notice. In the event of any disputes, AIA's decision shall be final and conclusive.
10. In the event of discrepancies in these terms and conditions between the English and Chinese versions, the English version shall prevail.
11. These terms and conditions are governed by and construed in accordance with the laws of the Hong Kong Special Administrative Region ("Hong Kong"), the Hong Kong Courts have exclusive jurisdiction if any dispute arises.
12. "AIA" refers to the Hong Kong Branch and/or Macau Branch of AIA International Limited (Incorporated in Bermuda with limited liability). "Hong Kong" and "Macau" refer to "Hong Kong Special Administrative Region" and "Macao Special Administrative Region" respectively.

Other Points to Note:

1. Financial planners must not use the Offer as an inducement for customers to apply for an insurance plan, nor should they use the Offer to influence customers in making informed decisions about purchasing the product. Before recommending any product to a customer, financial planners must conduct a financial needs analysis to assess the customer's needs and ability to afford the product. Customers should determine their premium based on their own needs and affordability.
2. This campaign can only be promoted within the territories of Hong Kong and Macau, according to the agent's relevant license. All solicitation activities and insurance applications must be conducted within Hong Kong and Macau. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants/Policyowner From MCV Business" and other MCV related guidelines.
3. Before contacting any customer, Financial Planners must check whether the customer has provided consent to the use of their personal data for direct marketing. If not, do not conduct any direct marketing (including electronic messages related to promotional activities) until explicit consent has been obtained from the customers.

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附錄 2：2026 年第 3 季【見面「友」禮】活動 — 適用客戶名單
Appendix 2: 2026 Q3【Meet-and-Greet Delights】Campaign – Applicable Customer List

名單將會於 7 月 1 日起陸續上載以下平台:
The list will be gradually uploaded to the following platforms on 1 July:

iEngage/AIA Smart > CRM > 進階搜尋 Advanced Search > AIA 保單資料 AIA Policy Information > 推廣活動 Campaigns
Smart+ >客戶及機遇 CRM & Leads > 現有客戶推廣活動 Existing Customer Campaigns

以下 CRM 客戶名單均適用:
- [Recapture] 2026 年 7-9 月重點客戶名單
- [Recapture] 2025 年重點客戶名單
- 2026 年高端客戶名單(7-9 月)
- [優易/簡易核保] 2026 年重點客戶名單(7-9 月)
- 2026 年高購買潛力客戶名單 (7-9 月)
- [Activation] 2026 年高購買潛力單一保單客戶 (7-9 月)

或參閱總名單:
- 2026【見面「友」禮】特選客戶名單

CRM customer lists below are all eligible:
- (Recapture) 2026 Jul-Sep Selected Customers
- (Recapture) 2025 Selected Customers
- 2026 High-value Customers (Jul-Sep)
- (Simplified/Preferential UW) 2026 Selected Customers (Jul-Sep)
- 2026 High propensity Customers (Jul-Sep)
- (Activation) 2026 High propensity Single-policy-holding Customers (Jul-Sep)

Or refer to the master list:
- 2026 Selected Meet-and-Greet Customers





AIA Smart / iPOS > 銷售機遇 Sales Opportunity > 推廣活動 Campaigns



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附錄 3：於 AIA+連結個人保單或賬戶的步驟
Appendix 3: Steps to link individual policies or accounts in AIA+

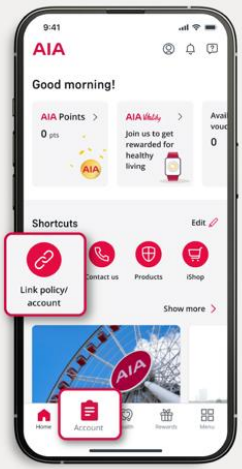
- 簡單幾步 輕鬆掌握賬戶



AIA+ HK

1.登入AIA+ 後，點選下方的「賬戶」
2.點選「連結保單/賬戶」
3.點選「個人保單賬戶」
4.按指示輸入個人資料作驗證及核實身份，並通過保單登記手機的一次性密碼作最後驗證
5.成功連結保單
6.重新登入後，便可檢視保單及使用各種服務

- Manage your account in just a few steps



AIA+ HK

1. After logging in to AIA+, tap 'Account' at the bottom
2. Tap 'Link Policy/Account'
3. Tap 'Personal Policy Account'
4. Follow the instructions to enter your personal information for verification and identity confirmation
5. Successfully link your policy
6. After logging in again, you can view your policy and use various services

>> 按此查閱個人保單或賬戶的連結步驟
>> Click here for the linkage guideline

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