AIA Hong Kong
Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333
AIA.COM.HK

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Memo

Attn	:	All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners (Hong Kong and Macau)	From	:	Amy Chan
Co/Dept	:	Mr. Alger Fung/ Mr. Louie Ho/ All Department Heads/ ABDD Executives	Dept	:	Management Team
Date	:	2 July 2026	Total page	:	7 + Appendix
Subject	:	(A260725) **2027 友邦保險財務策劃顧問持股計劃 (ASPP)** **2027 AIA Agency Share Purchase Plan**			

在全球經濟環境持續波動的背景下，友邦保險憑藉穩健的財務實力、卓越的盈利能力及多元化的業務佈局，持續展現強大的抗逆韌性與長遠發展潛力，穩居亞太區壽險市場的領導地位。面對市場挑戰，集團依然保持穩健表現，進一步鞏固其行業領先優勢，為未來持續增長奠定堅實基礎。

公司每年推出**「友邦保險財務策劃顧問持股計劃」(ASPP)**，讓一眾營業精英可透過配股方式以優惠價格獲得 AIA 的股份，與友邦一同分享企業發展的成果，讓您在成就非凡事業的同時，參與企業的長遠發展。

是次持股計劃競賽期分為 5 個月，**營業同事只要於其中 1 個競賽月**達到**類別指定排名**，即可獲得 2027 ASPP 資格，每個月都有機會爭取 ASPP 的席位！

立即行動，與友邦攜手邁向更高峰！

Beyond No.1 全心為客 堅守使命

有關競賽詳情請參閱下文。
For details, please refer to the contest information below.

Amy Chan
Chief Agency Officer
Agency Distribution
Hong Kong and Macau
AC/AL/CC/KT

1 全心為客 堅守使命
保單・承諾・使命
BEYOND NUMBER ONE

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2027 友邦保險財務策劃顧問持股計劃 (ASPP)

競賽資格：
所有財務策劃顧問(以個人業績計算)及營業單位主管(以個人業績計算或以營業組別業績計算)

競賽日期: 分為 5 個競賽期，
(i) 2026 年 7 月
(ii) 2026 年 8 月
(iii) 2026 年 9 月
(iv) 2026 年 10 月
(v) 2026 年 11 月
(每一位營業同事最多只會獲得 ASPP 資格一次。)

競賽規則及獎項:
以以下類別計算，於每個競賽期內以**首年佣金積分 (FYC Score)** 或 **全方位保障產品(TP) FYC** 達到以下指定排名，可獲 2027 友邦保險財務策劃顧問持股計劃 (ASPP) 資格：

類別	新晉財務策劃顧問	2026 卓越顧問	財務策劃顧問		營業單位主管
計算業績	個人業績				營業組別業績
獲繕發之業績類別	首年佣金積分 (FYC Score)			全方位保障產品(TP) FYC	首年佣金積分 (FYC Score)
排名 (每個競賽期)	首 10 名	首 10 名	首 230 名	首 10 名	首 50 名
獎賞	得獎者認購每兩股供款股份，可以每股 US$1 之代價配對 1 股，配股將於 3 年歸屬期後 (即 2030 年 5 月)^發放予得獎者				
供款	個人總 FYCS (由 **2026 年 7 月 1 日至 11 月 30 日**)之 **24% (5 個月)**			個人 TP FYC (由 **2026 年 7 月 1 日至 11 月 30 日**)之 **24% (5 個月)**	直屬營業組別總 FYCS (由 **2026 年 7 月 1 日至 11 月 30 日**)之 **12% (5 個月)**
最低供款*	HK$1,800				
最高供款	HK$150,000				

^實際發放日期以公司安排為準。
*如得獎者之最終可供款額低於訂明之最低供款額，得獎者將不獲 2027 友邦保險財務策劃顧問持股計劃 (ASPP) 資格。

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備註:

- **新晉財務策劃顧問**是指 2025 年 8 月至 2026 年 11 月入職之財務策劃顧問 (不包括持有財務策劃實習生合約者、持有 Industry LOU Package 合約者、重新加入之財務策劃顧問及營業單位主管)。
- **2026 卓越顧問**必須於該競賽期或之前成為卓越顧問，方可競逐該月份卓越顧問類別之 ASPP 資格。
- 有關 2026「卓越顧問」要求，及 2026 年入職之新晉財務策劃顧問的「卓越顧問」要求將根據入職月份訂立，詳情請參閱通告 A260155。
- **營業單位主管**以內部職銜計算。
- 同一競賽期內，如營業同事於以上多於一項類別 (首 10 名新晉財務策劃顧問、首 10 名 2026 卓越顧問、首 230 名財務策劃顧問、首 10 名全方位保障產品 FYC 之財務策劃顧問、及首 50 名營業單位主管)中均達到指定排名，該營業同事最後將會被安排於其中一項類別，以獲得較高供款之類別為準。而其另一項類別之排名將不會由下一位得獎者取替。
- 每位營業同事最多只會獲得 ASPP 資格一次。
- 每位得獎者可獲一張電子證書以茲表示能夠參與 2027 ASPP 的殊榮。
- 以上競賽獎賞為自願參與性質。
- 配股將於 3 年歸屬期後以每兩供款股份獲配一股的計算方法，以每股 US$1 之代價發放。每位得獎者之最高供款為 HK$150,000。供款會由 2027 年 3 月至 2028 年 2 月之 12 個月糧單中扣除(實際糧單發出日期以公司安排為準)。
- 每月供款上限為 HK$12,500 (即每月 HK$150,000/12 個月)，直至友邦保險集團另行通知。US$1 等於 HK$7.8。
- 每月最低供款額為 HK$150 (即每月 HK$1,800/12 個月)，直至友邦保險集團另行通知。如得獎者之最終可供款額低於競賽規則及獎項內訂明之最低供款額，得獎者將不獲 2027 友邦保險財務策劃顧問持股計劃 (ASPP) 資格。
- 歸屬期由"發售期"分配股份的第一天，即財務策劃顧問供款股份購買之日開始，並於第三個週年日期滿。
- 計劃年度的首次購買股份日三週年期滿後獲發放配股，假設：
  - 得獎者仍與 AIA 持有效之合約
  - 得獎者於歸屬期末有轉移或提取或沽售任何一個供股單位
- 有關全方位保障產品名單，請參閱附件。

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一般規則:

1. 所有人壽保險、意外及醫療附加契約、意外及醫療獨立保單的首年基本佣金及首年優質業務獎金 (只適用於香港)，以及人身意外保險、團體保險業務、退休金企業業務及退休金個人業務均計算於 FYC Score (FYCS)之內；詳情請參閱通告 A251220。
2. 用作競賽競逐排名計算之總 FYCS 是指於 2026 年當月(7 月/8 月/9 月/10 月/11 月內獲成功繕發/生效之保單/計劃。
3. 用作衡量 ASPP 可供款額計算之總 FYCS 或全方位保障產品(TP) FYC 是指於 2026 年 7 月至 11 月內獲成功繕發/生效之保單/計劃。
4. 新晉財務策劃顧問、2026 卓越顧問、營業單位主管或區域總監可以個人業績競逐「財務策劃顧問之 ASPP」。
5. 如營業同事於競賽期之前已遞交保單/保單已獲繕發，但於競賽期內撤回投保申請/取消保單，並再次投保相同產品計劃，其保單將不獲計算。
6. 所有由現有保單轉換/退保後同一受保人之保單將不獲計算。
7. 若兩位或以上之營業單位主管/財務策劃顧問共同完成 1 張保單，將平均計算予各人。競賽期完結時，若保單數目總數為點數，數目將下調為整數計算。
8. 同一受保人於競賽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。
9. 營業同事透過正本或電子方式遞交保單申請予 AIA，應預留充足時間確保有關申請已於截數前由 AIA 及/或已授權之單位收妥。
10. 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。
11. 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。
12. 所有獲獎者必須於獎賞發放時仍與 AIA 持有效合約。
13. AIA 保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
14. 如有任何異議，以 AIA 最後決定為準。

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AIA.COM.HK

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2027 AIA Agency Share Purchase Plan (ASPP)

Eligibility:
All Financial Planners (by personal production) & Agency Leaders (either by personal production or agency production)

Contest Period: There are 5 contest periods -

(i) July 2026
(ii) August 2026
(iii) September 2026
(iv) October 2026
(v) November 2026

(EACH producer will only get maximum ONE qualification in the whole ASPP campaign.)

Contest Rules & Award:
By categories below, Producers who achieve below top ranking by **FYC Score** or **Total Protection (TP) FYC** within designated contest period(s) will be awarded with qualification to purchase 2027 ASPP.

Category	New Financial Planner	2026 Premier Advisor	Financial Planner		Agency Leader
Production by	Personal Production				Agency Production
Being Delivered FYC Category	FYC Score			Total Protection (TP) FYC	FYC Score
Rank (per Contest Period)	Top 10	Top 10	Top 230	Top 10	Top 50
Award	Matching 1 Share at cost of US$1 per share for every 2 Contribution Shares purchased; 3-year vesting period before Matching Shares being delivered to awardees (i.e. in May 2030)^				
Contribution	**24%** of Personal Total FYCS from **1 Jul to 30 Nov 2026 (5 months)**			**24%** of TP FYC from **1 Jul to 30 Nov 2026 (5 months)**	**12%** of Direct Agency Total FYCS from **1 Jul to 30 Nov 2026 (5 months)**
Minimum Contribution*	HK$1,800				
Maximum Contribution	HK$150,000				

^Actual delivered date is subject to company's arrangement.
*If producers' final contribution amount is less than the minimum contribution amount stated above, producer will **NOT** be awarded with qualification to purchase 2027 ASPP.

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Remarks:

- **New Financial planners** are financial planners which are contracted between Aug 2025 to Nov 2026 (Excluding internship, Industry LOU Package, re-join, and agency leaders).
- **2026 Premier Advisor** must fulfil all Premier Advisor requirements on or before respective contest period to be eligible for 2026 Premier Advisor ranking category of that period.
- 2026 Premier Advisor requirements and Premier Advisor requirements for New Financial Planners contracted in 2026 are on pro-rata basis according to the contracted month. For details, please refer to memo A260155.
- **Agency leaders** are defined by compensation title.
- If a producer is being ranked in more than one category (Top New Financial Planner Level/Top 2026 Premier Advisor Level/Top Financial Planner Level/Top Total Protection FYC for Financial Planner/Top Leader Level/Top District Director Level), the producer can be finally entitled to either one of the levels within the same contest period, whichever the highest contribution can be offered from the respective category. However, his/her original seat will **NOT** be assigned to next qualifier in the forfeited category.
- EACH producer will only get maximum ONE qualification in the whole ASPP campaign.
- Each qualifier will be granted an electronic certificate in recognition of being awarded with the privilege to join the 2027 ASPP.
- The above contest award will be offered at voluntary participation basis.
- The Contribution shares are matched on 1-for-2 basis at the end of the 3-year vesting period, at a cost of US$1 per matching share. The maximum cap for the total contributed amount per qualifier is HK$150,000. Contributions will be deducted in 12 installments from Mar 2027 to Feb 2028 payroll (Actual payroll date is subject to company's arrangement).
- The monthly contribution cap amount will be HK$12,500 per month (HK$150,000/12 months), unless otherwise notified by AIA Group. US$1 is equivalent to HK$7.8.
- The minimum monthly contribution amount will be HK$150 per month (HK$1,800/12 months), unless otherwise notified by AIA Group. If producers' final contribution amount is less than the minimum contribution amount stated in the contest rules and awards, producer will NOT be awarded with qualification to purchase 2027 ASPP.
- The vesting period begins on the first allocation day during an Offering Period on which Financial Planner Contribution Shares are purchased and ends on the third anniversary of that date.
- Matching Shares for a plan year are delivered on the third anniversary of the purchase date, provided that:
  - Awardee holds valid contract with AIA
  - Awardee has not transferred or withdrawn or sold any contribution shares during the vesting period.
- For the Total Protection Product list, please refer to the Appendix.

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General Rules & Regulations:

1. First Year Basic Commission and First-Year Quality Credit (Year 1 QC, applicable in Hong Kong only) of Life, Life A&H Riders and Standalone Life A&H, as well as FYC of PA, Group Insurance, Pension Corporate and Pension Retail will be counted in FYC Score (FYCS). Please refer to memo A251220 for details.
2. Total FYCS for contest ranking includes case/policy/plan being delivered within the contest month only (Jul 2026/Aug 2026/Sep 2026/Oct 2026/Nov 2026).
3. Total FYCS or Total Protection (TP) FYC for measurement of ASPP available contribution amount includes case/policy/plan being delivered from Jul to Nov 2026.
4. New Financial Planners/2026 Premier Advisor/Agency Leaders/District Directors can qualify by personal production for the 'ASPP for Financial Planners'.
5. Producers who have submitted policies / policies issued before the contest period but withdraw the captioned policy applications / cancel the captioned issued policies during the contest period and then reapply for the same products for the same insured, the corresponding case/ FYC will not be counted.
6. Cases changed / lapsed from existing policies of the same insured will not be counted.
7. Joint policies will be shared evenly among the co-producers. Cases will be counted according to total no. of cases rounding down into an integer after contest completion.
8. Policies under the same insured for the same basic plans and with same premium pay period, which are issued within the contest period will be counted as one case.
9. For applications submitted to AIA via hardcopy application or electronic application, producers are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorized vendor before the cut-off time.
10. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
11. 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 award based on the result and any substantiated violations of required sales conduct.
12. Qualifiers must be inforce in AIA at the time the awards are paid out/redeemed.
13. 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.
14. In the event of dispute, AIA's decision is final and conclusive.

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附件 Appendix – 全方位保障產品 Total Protection Product

產品 Products	
Admire Life 2	「裕滿人生」保障計劃 2
AIA 2-in-1 Protection Linked Plan	AIA「兩全保」保障型投資相連壽險計劃
AIA Assemble	自在自選危疾保
AIA One Absolute	AIA 唯一摯保
AIA One Absolute Pearl	AIA 唯一摯保明珠
AIA Voluntary Health Insurance Flexi Scheme	AIA 自願醫保靈活計劃
AIA Voluntary Health Insurance Privilege Ultra Scheme	AIA 自願醫保尊耀計劃
AIA Voluntary Health Insurance SelectWise Scheme	AIA 自願醫保睿選計劃
AIA Voluntary Health Insurance Standard Scheme	AIA 自願醫保標準計劃
Bonus Power Plan 2 (EP)	「充裕未來」計劃 2（特級保障）
Cancer Care Essence	智護癌症保
Cancer Guardian 3	癌症全方位保障 3 系列
Cancer Guardian Pearl 3	癌症全方位明珠保障 3
CEO Essence Medical Plan 2	亞洲至尊醫療計劃 2
CEO Essence Pearl Medical Plan 2	亞洲至尊明珠醫療計劃 2
CEO Medical 5	至尊醫療計劃 5
CEO Pearl Medical 5	至尊明珠醫療計劃 5
China Assist Protection Plan	「伴您遨遊中國」計劃
EasyGuard Care Essence	守康易危疾保
EasyGuard Term Life Plan	「守康易定期壽險計劃」
Enhanced Critical Illness Rider Pro	特選危疾附加契約
Essence - On Your Side Insurance Plan (EOYS)	「簡繳•愛伴航」保險計劃
Executive Care Pro 2	泰然安心保 2
Expert Term Life Plan Series	尊誠定期壽險計劃系列
Flexi-MediGuard	靈活住院惠益保障計劃
Fortune Promise 2	「諾享」保障計劃 2
GBA Health Connect Outpatient Plan	大灣醫薈通門診計劃
Grand VIP	「豐逸行」
Guaranteed Issue Whole Life Plan	「有投必保」儲蓄壽險計劃
Health Journey Guardian	全程守護健康保系列
Here For You Refundable Accident Plus	「常伴您」保費退還意外升級保障
Here For You Refundable Hospital Cash Plan	「常伴您」保費退還住院現金保障

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AIA Hong Kong
Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333
AIA.COM.HK

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產品 Products	
Here For You Refundable Surgical Cash Plan	「常伴您」保費退還手術現金保障
HOSPITALIZATION BENEFIT	「樂無憂」住院惠益附加契約
Individual Medical Plan	「倍無憂」醫療保障計劃
Journey Protection Medical Plan	全程保醫療保障計劃
Lady Care Pro	「摯愛您」保障計劃
Level-Up Protect Cancer Plan	「進添」計劃 - 癌症保障系列
Level-Up Protect Pearl Cancer Plan	「進添明珠」計劃 - 癌症保障系列
Life Endowment Special AP	分期支取儲蓄終身壽險連額外保障計劃
MEDIGUARD HOSPITAL INCOME	住院惠益
Metro-Trio Medical and Critical Illness Protection Plan (MT)	「都市三保」醫療危疾保障計劃 (MT)
Metro-Trio Pearl Medical and Critical Illness Protection Plan	「都市三保」醫療危疾保障計劃
Multiple Care Pro 2	多重安心保 2
On Your Side Insurance Plan 2	「愛伴航」保險計劃 2
On Your Side Insurance Plan 2 – First Gift	「愛伴航 – 首護摯寶」保險計劃
OptimaCEO Medical Plan	極臻 • 至尊醫療計劃
OptimaCEO Medical Plan - First Gift	極臻 • 至尊醫療計劃 – 首護摯寶
OptimaCEO Medical Supplementary Contract (OPCEOR)	極臻•至尊醫療附加契約 (OPCEOR)
OptimaCEO Pearl Medical Plan	極臻 • 至尊明珠醫療計劃
OptimaCEO Pearl Medical Plan - First Gift	極臻 • 至尊明珠醫療計劃 – 首護摯寶
OptimaCEO Pearl Medical Supplementary Contract (OPCEOPR)	極臻•至尊明珠醫療附加契約 (OPCEOPR)
PAC Select 3	自選人身意外保險 3 (PAC Select 3)
Par WL - Guaranteed Issue Whole Life	「有投必保」儲蓄壽險計劃
Pretty Choice Rider Pro	「愛意」附加契約
Prime Care Pro 2	進泰安心保 2
Privilege Medical Rider	「尊顯」醫療附加契約
Privilege Ultra Medical Plan	尊耀醫療計劃
Privilege Ultra Pearl Medical Plan	尊耀明珠醫療計劃
ProsperLife Insurance Plan	「活然人生」保險計劃
SECURE FIRST	意安心
Secure First Plus	「意安心升級保障」
SelectWise Medical Plan	「睿選」醫療計劃
SelectWise Pearl Medical Plan	「睿選明珠」醫療計劃

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Unit 3601, 36/F, AIRSIDE,
2 Concorde Road,
Kai Tak, Kowloon
T: (852) 2881 3333
AIA.COM.HK

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產品 Products	
Serene Life	「樂怡人生」保障計劃
Serene Life (Annual Dividends)	「樂怡人生」保障計劃 (週年紅利)
Severe Illness Medical Protection Rider	嚴重疾病醫療保障附加契約
Severe Illness Pearl Medical Protection Rider	嚴重疾病明珠醫療保障附加契約
Shield Up Cancer Protection Plan	「友愛護」癌症保障計劃
Silvery Protect	「銀意保」
Simple Care Essence	簡護危疾保
Simple Care Essence Pearl	「簡護危疾明珠保」
Simplified Accidental Death & Dismemeberment Rider	簡易意外死亡及斷肢附加契約
Simply Love Encore 5	「簡愛・延續」保障計劃 5
Smart Elite Ultra	多重智倍保
StepUp Medical Protection Plan 2	「友心意」醫療保障計劃 2
Super Adults Shield (SAS)	「盛年意家保」
Super Good Health Medical Plan 2	特級「健康之寶」醫療保障計劃 2
Super HealthGuard Pro	「進升危疾保障計劃」
Super Kids Shield	童年意家保
Super Seniors Shield	豐年意家保
Travel Smart	醒目遊
U-Select	「您想」投資連繫壽險計劃
Wealth Elite 2 - Ruby	「財富恆裕 2 • 霞」壽險計劃
Wealth Elite 2 - Sapphire	「財富恆裕 2 • 蔚」壽險計劃
Wealth Preserver 5	「財富相傳 5」壽險計劃
Wisdom Term Life Plan Series	摯誠定期壽險計劃系列
Xtra Protect	「添意保」

- 更新截至2026年3月30日 Updated as of 30 March 2026

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