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健康長久好生活

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	:	7 July 2026	Total page	:	12

Subject : **(A260736) 全新季度保單排名賽 及 躍動之星 (Active Club) 計劃優化**
New Quarterly Case Ranking Challenge & Active Club Enhancement

在瞬息萬變的市場環境之下，穩定而持續的業務表現，是營業同事穩步向上的關鍵。

「躍動之星 (Active Club)」現已全面升級，為願意多走一步的您，帶來更多入場機會、更快回報，以及更高層次的競賽舞台——引入「每月 × 全年 × 連續」多重獎賞機制，從即時抽獎到年度重點獎賞，層層推進，讓表現不再只被記錄，而是即時被獎賞、被肯定。

同時，公司亦設立全新季度保單排名賽，為努力持續開單的同事提供新的競賽平台，透過相互競賽不斷提昇。

無論是透過「躍動之星」累積長線回報，還是在排行賽中爭取突破，均希望鼓勵大家建立持續開單的節奏，將即時行動轉化為長遠優勢。

把握節奏，持續發揮，讓努力不止被看見，更被嘉許！

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.



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

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

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季度保單排名賽

競賽資格

所有香港及澳門營業單位主管及財務策劃顧問

競賽日期

由 2026 年 7 月 1 日開始，按每個季度進行 (3 個月)

競賽規則及獎項

只要於季度內躋身人壽保單數目相關排名，即可獲得嘉許。

類別	業績計算	人壽保單數目排名
區域總監	按區域業績	首3名
營業單位主管	按直屬營業單位業績	首3名
財務策劃顧問	按個人業績	首3名

備註

1. 以下於每季度競賽期內獲成功繕發/生效之保單將當作 1 張人壽保單計算；只計算基本計劃，不包括附加契約：
   - 1 張人壽保單（僅計算首碼為「B」和「G」的保單）
   - 1 張團體保險保單
   - 1 張退休金企業業務個案
2. 若同一類別之人壽保單數目出現相同排名，公司將以該季相應類別的 FYC C&A 再作排名。
3. 此競賽結果將不接受上訴申請。

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躍動之星 (Active Club) 計劃優化

競賽資格

所有香港及澳門營業單位主管及財務策劃顧問

競賽規則

財務策劃顧問或營業單位主管於每月份達到下列保單要求，將合資格成為該月份之躍動之星會員：

1. 4張人壽保單*；或
2. 3張人壽保單* + 3張個人意外保險保單**

* 以下當作1張人壽保單計算：

- 1張人壽保單（僅計算首碼為「B」和「G」的保單）
- 1張團體保險保單
- 1張退休金企業業務個案
- 3張退休金個人業務個案

** 以下當作1張個人意外保險保單計算：

- 1張獨立個人意外保險保單
- 1張人身意外保險保單

取得躍動之星會籍之營業單位主管，將獲提供最長2個月的寬限期以獲得連續計算躍動之星會籍。

獎項

- **[全新] 銷售年度及每月獎賞：**

1. 每月躍動之星抽獎

成為當月份躍動之星會員，可獲得1次抽獎機會以參加當月份躍動之星每月大抽獎，有機會贏取包括相當1両重之黃金^及其他獎品。

^視乎供應情況而定，公司保留更改、替換、調整或取消而不作另行通知之權利

2. 年度餐飲體驗

於銷售年度內任何6個月成為躍動之星會員，可獲得雙人餐飲禮券乙套 (每年最多可享1次)。

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3. **年度躍動之星大抽獎**

於銷售年度內任何6個月成為躍動之星會員，可獲得1次年度大抽獎機會，以參加該銷售年度躍動之星年度大抽獎，有機會贏取價值8兩重之黃金^及其他獎品。

如於該銷售年度成為6個月以上躍動之星會員，將按其當年額外之會員月份數目，額外獲得多1次或更多抽獎機會 (8個月會員獲額外2次，9個月會員獲額外3次， 如此類推)， 全年可獲最多7次機會 (相當於成為該年12個月會員)。

^視乎供應情況而定，公司保留更改、替換、調整或取消而不作另行通知之權利

4. **傑出壽險從業員慶祝會 (AAC) 嘉許**

於銷售年度內12個月皆成為躍動之星會員，可獲邀出席傑出壽險從業員慶祝會 (AAC)並獲得嘉許。

每月完成指定藍十字保單保單要求亦可獲邀出席活動，有關詳情請於稍後留意通告A260741。

- **連續會員獎賞：**

1. **現金獎賞及證書**

符合指定連續月數會員資格，一如以往可繼續獲得以下現金獎賞及證書：

連續月數	現金獎賞 (HK$)	證書
12	$800	電子證書
24	$1,200	
36	$1,400	
48	$1,600	
60	$1,800	
72 / 84 / 96 / 108	$2,000	
120	$2,000	裱裝證書
132 / 144 / 156 / 168 / 180	$3,000	
192 或以上 (每連續12個月)	$4,000	

2. **[全新] 躍動之星榮譽嘉許聚會**

連續60個月或以上成為躍動之星會員，可獲邀參與躍動之星榮譽嘉許聚會。

3. **Premier Honour Roll 襟針嘉許**

連續240個月成為躍動之星會員，可獲授予Premier Honour Roll襟針。

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會員資格

1. **Marathon 躍動之星會員**
   在連續60個月（即5年）符合資格的會員，可成為Marathon 躍動之星會員，將獲得嘉許及可參與躍動之星榮譽嘉許聚會。

2. **躍動之星終身會員 (Life Member)**
   在連續120個月（即10年）符合資格的會員，可成為躍動之星終身會員，將獲得嘉許及可參與公司往後舉辦的所有躍動之星榮譽嘉許聚會。

3. **躍動之星Honour Roll 會員**
   在連續180個月（即15年）符合資格的會員，將獲得嘉許及可參與公司往後舉辦的所有躍動之星榮譽嘉許聚會 。

4. **躍動之星Premier Honour Roll 會員**
   在連續240個月（即20年）符合資格的會員，將獲得嘉許及可參與公司往後舉辦的所有躍動之星榮譽嘉許聚會，並獲授予Premier Honour Roll襟針。

5. **躍動之星Quarter Century會員**
   在連續300個月（即25年）符合資格的會員，將獲得嘉許及可參與公司往後舉辦的所有躍動之星榮譽嘉許聚會 。

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備註

1. 所有獎品均須視乎供應情況而定，公司保留更改、替換、調整或取消任何獎品而不作另行通知之權利。
2. 「每月躍動之星抽獎」將於2026年7月1日生效。
3. 以下獎賞的躍動之星會員月數將追溯2026年1月1日起計算：
   - 年度餐飲體驗
   - 年度躍動之星大抽獎
   - 傑出壽險從業員慶祝會 (AAC) 嘉許
4. 下列以連續會籍月數達標的獎賞，就 2026年6月30日之前已累積之連續會籍月數將全數保留，並於新計劃繼續累積計算：
   - 現金獎賞及證書
   - 躍動之星嘉許慶祝活動
   - 襟針嘉許
   - 會員資格
5. 以下獎賞將不接受上訴申請：
   - 每月躍動之星抽獎
   - 年度躍動之星大抽獎
6. 每位躍動之星會員於每個銷售年度可獲得最多1套雙人餐飲禮券；有關使用詳情，以相應供應商條款為準。
7. 每位躍動之星可獲得最多1個襟針嘉許。
8. 營業單位主管可獲提供最長2個月的寬限期以獲得連續計算躍動之星會籍，單以會員月數計算之獎賞將不予獲得寬限期。
9. 有關銷售年度及每月獎賞的相關業績，請參考iPA 2.0；以連續會籍月數計算獎賞的業績，請參考友邦財務策劃顧問專頁(Agency Corner) > 競賽及成績 > Production Report > Active Club。
10. 因應「躍動之星」計劃升級，原「躍動之星2.0」競賽將由2026年7月1日起停止適用。

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一般規則

1. 團體保險業務包括度身訂造計劃，套裝計劃（Laughing 自選牙科保障計劃、澳門摯開心保障計劃及原有保單轉換的保單除外），「意安心升級保障」 - 友邦特選成員版，「友心意」醫療保障計劃 2、「友愛護」癌症保障計劃或另有規定。(請注意: 財務策劃顧問必須通過保險中介人資格考試之試卷二「一般保險」考試（即擁有 P2 牌照），方可銷售「友心意」醫療保障計劃 2 。)
2. 退休金企業業務個案包括公積金計劃(ORSO)、澳門退休金計劃及強積金僱主計劃。
3. 退休金個人業務個案包括自僱人士退休計劃、休悠樂、客戶尊享強積金個人賬戶計劃、強積金可扣稅自願性供款計劃、澳門私人退休金計劃及公積金個人計劃。同一身分證號碼的自僱人士退休計劃、休悠樂、客戶尊享強積金個人賬戶計劃、澳門私人退休金計劃及公積金個人計劃，於同一個銷售年度內，只計算為一宗退休金個人業務個案。強積金可扣稅自願性供款計劃將額外計算為一個退休金個人業務個案。
4. 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。
5. 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。
6. 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。
7. 同一受保人於競賽期內投保同一基本計劃之所有新保單，將以一張保單計算。
8. 營業同事遞交保單申請予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。
9. 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。
10. 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。
11. 所有獲獎者必須於獎賞發放時仍與AIA持有效合約。
12. AIA保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
13. 如有任何異議，以AIA最後決定為準。

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Quarterly Case Ranking Challenge

Eligibility
All Hong Kong and Macau Agency Leaders and Financial Planners

Contest Period
Quarterly (3 months) from 1 July 2026

Contest Rules & Awards
Qualifiers who achieved the below ranking by Life cases in each quarter will be entitled recognition.

Category	Production by	Rank by Life cases
District	District Production	Top 3
Agency Leader	Direct Agency Production	Top 3
Financial Planner	Personal Production	Top 3

Remarks
1. Counting of Life case refers to below case/policy being delivered/effective within each quarter; only basic plans would be counted, rider cases are excluded.
   - 1 Life case (only policy with prefix 'B' & 'G' will be counted)
   - 1 Group Insurance case
   - 1 Pension Corporate case
2. In case of ties with the same Life Cases under the same category, the ranking will be determined by FYC C&A of respective category in respective quarter.
3. Appeal is not entertained in this contest.

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Active Club Enhancement

Eligibility
All Hong Kong and Macau Agency Leaders and Financial Planners

Contest Rules
A Financial Planner or Agency Leader will be qualified as a member of the Active Club for a sales month if he/she fulfils any ONE of the following requirements:
1. 4 Life cases*; OR
2. 3 Life cases* + 3 PA cases**

* 1 Life case can be achieved by:
- 1 Life case (only policy with prefix 'B' & 'G' will be counted)
- 1 Group Insurance case
- 1 Pension Corporate case
- 3 Pension Retail cases

** 1 PA case can be achieved by:
- 1 IPA case
- 1 PAC case

Agency Leaders who achieve the Active Club membership will be offered an extra chance with a maximum of 2-month catch up period for the consecutive term of the membership.

Awards

- [New] Sales year and monthly awards:

1. **Monthly lucky draw**
   Active Club Member for the current sales month will be eligible for 1 lucky draw chance for the monthly lucky draw, to win prizes including gold equivalent to 1 tael in weight^ and other prizes.
   ^Subject to availability; Company reserves the right to review, substitute, amend or withdraw the prizes

2. **Annual Award for dining experience**
   Financial Planners or Agency Leaders qualified as a member for 6 months in the current sales year will be awarded 1 set of dining coupon for 2 persons (maximum 1 entitlement per year).

3. **Annual Grand lucky draw**
   Financial Planners or Agency Leaders qualified as a member for 6 months in the current sales year will be eligible for 1 lucky draw chance of the annual grand lucky draw to win prizes including gold equivalent to 8 tael in weight^ and other prizes.
   If he/she qualified for 7 months or above in the current sales year, additional chances will be granted for each extra qualifying month beyond the basic 6-month requirement (additional 2 chances for 8-month members, additional 3-chance for 9-month members, and so on), up to maximum 7 chances in a year (equivalent to qualifying as a member for all 12 months).
   ^Subject to availability; Company reserves the right to review, substitute, amend or withdraw the prizes

4. **Recognition in Annual Awards Celebration (AAC)**
   Financial Planners or Agency Leaders qualified as a member of the Active Club for 12 months in the current sales year will be invited and recognized in Annual Awards Celebration (AAC).
   Financial Planners or Agency Leaders who achieved the designated number of Blue Cross policies each month will be invited too, please stay tuned for future announcement via memo A260741 for details.

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- **Consecutive Member awards:**

1. **Cash Award & Certificate**
   Cash Award & Certificate will be awarded to the Active Club Members according to the number of consecutive months of membership:

No. of Consecutive Months	Cash Award (HK$)	Prize
12	$800	Electronic Certificate
24	$1,200	
36	$1,400	
48	$1,600	
60	$1,800	
72 / 84 / 96 / 108	$2,000	
120	$2,000	Framed Certificate
132 / 144 / 156 / 168 / 180	$3,000	
192 & above (every 12 consecutive months)	$4,000	

2. **[New] Active Club Recognition Event**
   Financial Planners or Agency Leaders who achieved 60 or more consecutive months of membership will be invited for an Active Club Recognition Event.

3. **Premier Honour Roll Lapel pin recognition**
   Members qualified for 240 consecutive months of membership will be awarded with a Premier Honour Roll lapel pin.

Membership Status

1. **Marathon Active Club Member**
   An individual will become a Marathon Active Club Member after obtaining 60 consecutive months (5 years) of membership; he/she will be invited to the next Active Club Recognition Event.

2. **Life Member**
   An individual will become an Active Club Life Member after obtaining 120 consecutive months (10 years) of membership; he/she will be invited to the next Active Club Recognition Event and entitled to attend all subsequent Active Club Recognition Event hosted by the Company.

3. **Honour Roll**
   An individual will become an Honour Roll Active Club Member after obtaining 180 consecutive months (15 years) of membership; he/she will be invited to the next Active Club Recognition Event and entitled to attend all subsequent Active Club Recognition Event hosted by the Company.

4. **Premier Honour Roll**
   An individual will become a Premier Honour Roll Active Club Member after obtaining consecutive 240 months (20 years) of membership; he/she will be invited to the next Active Club Recognition Event, entitled to attend all subsequent Active Club Recognition Event hosted by the Company and awarded with a Premier Honour Roll lapel pin.

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5. **Quarter Century**
   An individual will become a Quarter Century Active Club Member after obtaining 300 consecutive months (25 years) of membership; he/she will be invited to the next Active Club Recognition Event and entitled to attend all subsequent Active Club Recognition Event hosted by the Company.

Remarks

1. All prizes are subject to availability. The Company reserves the right to review, substitute, amend or withdraw any prize without prior notice.
2. "Monthly lucky draw" will be effective from 1 July 2026.
3. For the following rewards, the counting of Active Club membership months will be applied retrospectively from 1 January 2026:
   - Annual Award for dining experience
   - Annual Grand lucky draw
   - Recognition in Annual Awards Celebration (AAC)
4. For the following awards based on consecutive months of Active Club membership, all accumulated consecutive months up to 30 June 2026 will remain unaffected and carry forward from 1 July 2026 onwards:
   - Cash Award & Certificate
   - Active Club Recognition Event
   - Lapel pin recognition
   - Membership Status
5. Appeal is not entertained for below awards:
   - Monthly lucky draw
   - Quarterly ranking challenge for recognition
   - Annual Grand lucky draw
6. Each member's award under "Annual Award for dining experience" is capped at 1 set of dining coupon for 2 persons in each sales year; all services and offers are subject to the hotel's terms and conditions.
7. Each member can receive Lapel pin recognition for once.
8. 2-month catch up period for agency Leaders will be applied for calculating the consecutive term of the membership, awards qualifying by number of Active Club membership only will not be applied.
9. Please refer to iPA 2.0 for performance of Sales year and monthly awards, and Agency Corner for performance of Consecutive Member awards (Contest & performance > Production Report > Active Club).
10. In line with the enhancement of the Active Club scheme, the existing Active Club 2.0 scheme will cease with effect from 1 July 2026.

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General Rules & Regulations

1. Group Insurance Cases include tailor-made plans, packaged plans (excluding Laughing Voluntary Dental Care Plan/ Cheers Macau Dental Plan and any conversion from existing policies), Secure First Plus – AIA Selected Member version, StepUp Medical Protection Plan 2, Shield Up Cancer Protection Plan and any otherwise specified. (Please note that Financial Planner is required to pass IIQE Paper II - General Insurance (i.e. P2 License) in order to sell StepUp Medical Protection Plan 2.)
2. Pension Corporate Cases include ORSO, Macau Corporate Pension Schemes and MPF Employer Scheme.
3. Pension Retail Cases include Self-Employed Person (SEP) Schemes, MPF Personal Account (MPFPA), Preferential MPF Personal Account, MPF Tax Deductible Voluntary Contribution Scheme (TVC), Macau PPF Personal Account and Macau Individual Provident Fund Scheme. Only one CS - Pension retail case will be counted for each unique ID under SEP Schemes, MPFPA, Preferential MPF Personal Account, Macau PPF Personal Account and Macau Individual Provident Fund Scheme within the same sales year. TVC will be counted separately for each unique HKID.
4. 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.
5. Cases changed/lapsed from existing policies of the same insured will not be counted.
6. 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.
7. Policies under the same insured for the same basic plans, which are issued within the contest period will be counted as one case.
8. For case applications submitted to AIA, 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.
9. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
10. 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.
11. Qualifiers must be inforce with AIA at the time the awards are paid out/ redeemed.
12. 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.
13. In the event of dispute, AIA's decision is final and conclusive.

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