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

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong)	From:	Victor Man
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Agency Executives / IVS Executives / Contact Centre	Dept:	Corporate Solutions
Date:	01 July 2026	Total pages:	4
Subject:	**(A260737) 2026 年第 3 季 AIA 強積金個人個案客戶推廣** **2026 Q3 AIA MPF PA Customer Offer**		

好消息！為支持各財務策劃顧問於2026 年第 3 季繼續衝刺，企業業務隆重推出**「2026 第 3 季 AIA 強積金個人個案客戶推廣」**！**合資格強積金個人賬戶計劃及 AIA 強積金可扣稅自願性供款計劃成員[1]最高可享一次性紅利高達 HK$38,888**！轉入資產越多，紅利越豐厚！詳情如下：

推廣期	**2026 年 7 月 1 日至 9 月 30 日**
合資格業務	**強積金個人個案**
合資格計劃	**統稱「成員」** • **「休悠樂」個人賬戶計劃（「休悠樂」）** • **AIA強積金可扣稅自願性供款計劃（「TVC」）**
優惠內容	**雙重優惠[3]：高達HK$38,888紅利** **優惠一** (i),(ii),(iv) 全新及現有成員從第三方受託人轉入的新強積金資產，可尊享一次性紅利(「紅利」)，受條款及細則限制。 **優惠二** (i),(iii),(iv),4 成員若符合優惠一之資格及以下其中一項條件，可享額外紅利，受條款及細則限制： 1. 在2026年6月30日或之前已成為 AIA 人壽保單之持有人[5]；或 2. 將強積金賬戶連結至AIA+並於積金智「邦」手完成風險評估測試

從第三方受託人轉入新強積金資產（港元）	一次性紅利（港元）		
	優惠一	優惠二	一次性紅利總額
	基本紅利	額外紅利	
80,000 - 379,999	288	100	388
380,000 - 879,999	688	200	888
880,000 - 1,379,999	2,388	1,000	3,388
1,380,000 - 1,879,999	6,888	2,000	8,888
1,880,000 - 2,379,999	8,888	5,000	13,888
2,380,000 - 3,879,999	13,888	5,000	18,888
3,880,000或以上	33,888	5,000	**38,888**

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紅利計算及派發：

i. 紅利將於 2027 年 10 月前按合資格成員的最新投資選擇派發。

ii. 紅利金額將按成員於 2026 年 7 月 1 日至 9 月 30 日期間，從其他受託人轉入新強積金資產的總和計算。成員需在 2026 年 7 月 1 日至 2027 年 10 月紅利派發日期間未曾作任何提款。

iii. 成員需在 2026 年 9 月 30 日前將強積金賬戶連結至 AIA+，並於積金智「邦」手完成風險評估測試。完成測試後，成員需確保測試畫面顯示下面的版面，以獲得額外紅利。



iv. 紅利將按成員於派發紅利當日最新的投資選擇，以單位/金額形式分配/存入到成員的賬戶。

條款及細則：

1. 成功參與「休悠樂」或「TVC」之成員，將受「休悠樂」及「TVC」詳載於申請表格內之有關條款及細則所約束。
2. 紅利只適用於在派發紅利當日仍然生效之成員賬戶，並在 2026 年期間未曾獲發任何一次性紅利之成員。
3. 此優惠不可與任何其他現存優惠同時享用。
4. 成員若同時符合優惠二下之條件（1）及（2），亦只能獲享一次額外紅利。
5. 就優惠二之條件（2）而言，額外紅利只適用於在 2026 年 6 月 30 日或之前已成為 AIA 人壽保單之持有人的成員，且至少一張人壽保單於 2026 年 9 月 30 日仍然生效。
6. 就保證組合以外之單位化強積金基金而言，有關紅利將以單位形式分配到你的賬戶。而就保證組合（一項非單位化基金）而言，有關紅利將以金額形式存入到你的賬戶。

一般規則：

- 財務策劃顧問必須持有有效的相關牌照，方可銷售推廣活動中的產品。
- 友邦保留隨時闡釋及修改本推廣活動規則之權利，恕不另行通知。
- 如有任何有關此優惠、條款及細則闡釋之爭議，友邦保險（國際）有限公司保留最終決定權。

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聯絡。

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Good News! To support all Financial Planners in driving continued performance in 2026 Q3, Corporate Solutions is delighted to launch the "2026 Q3 AIA MPF PA Customer Offer"! Eligible MPF Personal Account and MPF Tax Deductible Voluntary Contribution members[1] can enjoy up to HK$38,888 one-off bonus! The more assets transferred-in, the greater the bonus! Details are as follows:

Promotion Period	1 July – 30 September 2026
Qualifying Business	MPF Retail Case
Qualifying Plan	Collectively the "members" • AIA MPF Personal Account Programme (MPFPA) • AIA MPF Tax Deductible Voluntary Contribution Programme (TVC)
Offers Details	**Double Offers[3]：Up to HK$38,888 Bonus** Offer 1 (i),(ii),(iv) New and existing members who newly transferred-in MPF assets from a third-party trustee can enjoy a one-off bonus (the "Bonus"), subject to terms and conditions. Offer 2 (i),(iii),(iv),4 Members who are eligible for Offer 1 and fulfill either of the following criteria can enjoy an extra Bonus, subject to terms and conditions: 1. Become the owner of an AIA life insurance policy on or before 30 June 2026[5]; or 2. Link their MPF account to AIA+ and complete risk assessment in the MPF Smart Advisor

Newly transferred-in MPF assets from a third-party trustee (HK$)	One-off Bonus (HK$)		
	Offer 1	Offer 2	Total One-off Bonus
	Basic Bonus	Extra Bonus	
80,000 - 379,999	288	100	388
380,000 - 879,999	688	200	888
880,000 - 1,379,999	2,388	1,000	3,388
1,380,000 - 1,879,999	6,888	2,000	8,888
1,880,000 - 2,379,999	8,888	5,000	13,888
2,380,000 - 3,879,999	13,888	5,000	18,888
3,880,000 or above	33,888	5,000	38,888

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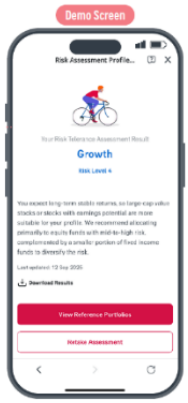
Bonus calculation and distribution:

i. The Bonus will be distributed by October 2027 according to the eligible member's latest investment mandate.
ii. The Bonus amount will be calculated based on the aggregate newly transferred-in MPF assets from other trustees that are fully settled during 1 July - 30 September 2026, provided that no withdrawal is made from 1 July 2026 up to the Bonus distribution date in October 2027.
iii. Members must link their MPF account to AIA+ and complete the MPF Smart Advisor risk assessment by 30 September 2026. To be entitled to extra bonus, members must ensure the assessment completion screen displays the format shown below.



iv. The Bonus will be allocated/credited to member's account in the form of a unit/amount rebate[6], in accordance with the member's latest investment mandate on the date of Bonus distribution.

Terms and conditions:

1. Upon successful enrolment into the MPFPA or TVC, members will be bound by all the terms and conditions set out in the MPFPA and TVC application form.
2. The Bonus is only applicable to the member accounts that remains active on the Bonus distribution date and have not received any one-off bonus during 2026.
3. These offers cannot be used in conjunction with any other pre-existing offer(s).
4. Members who fulfill both criteria (1) and (2) under Offer 2 will only be entitled to enjoy the extra Bonus once.
5. For criteria (2) under Offer 2, the extra Bonus is only applicable to members who became the owner of an AIA life insurance policy on or before 30 June 2026 and for whom at least one life insurance policy remains in-force on 30 September 2026.
6. For MPF funds (other than the Guaranteed Portfolio), which are unitised funds, the Bonus will be allocated in the form of units. For the Guaranteed Portfolio, which is not a unitised fund, the Bonus will be credited as a cash amount.

General Rules:

- Financial Planners must hold a valid, relevant license to sell products under this promotion.
- AIA reserves the right to interpret and amend the rules, terms and conditions of this promotion at any time without prior notice.
- In case of any dispute about these offers or the interpretations of the terms and conditions herein, AIA International Limited's decision shall be final and conclusive.

If you have any questions, please contact your designated CSBD Agency Executives.

Yours faithfully,

Victor Man
Head of CS Business Development
Agency Distribution, Corporate Solutions

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