友邦香港
香港北角電氣道 183 號
友邦廣場 12 樓

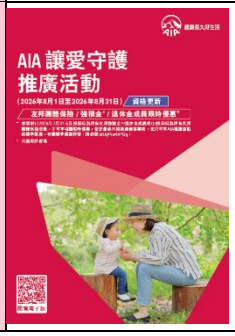
AIA Hong Kong
12/F, AIA Tower
183 Electric Road
North Point
Hong Kong

Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)	From:	Winnie Fung
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Executives / IVS Executives / Contact Centre	Dept:	Corporate Solutions
Date:	01 August 2026	Total pages:	4

Subject: **(A260816) 2026 Q3 IVS「友得揀」客戶尊屬優惠 [客戶資格更新 (8月)]**
2026 Q3 IVS Exclusive Customer Offer [Customer Eligibility Update (August)]

合資格尊享 IVS「友得揀」優惠的客戶定義已更新為「i) 客戶須於 **2026 年 7 月 31 日**及投保時為現有友邦強積金⁺ / 退休金@成員或 (ii) 投保時為現有友邦團體保險成員，才可享相關限時優惠。」**而優惠內容不變**。詳情如下：

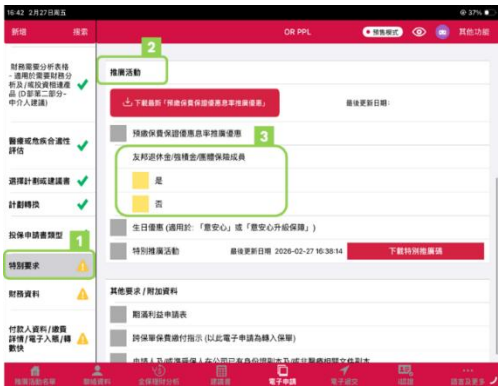
客戶資格更新詳情*	▪ 於 **2026 年 7 月 31 日**及投保時為現有友邦強積金^ / 退休金@成員；或 ▪ 投保時為現有友邦團體保險成員
優惠內容 **維持不變**	客戶於推廣期內投保**指定個人產品**，即可享有以下限時**額外優惠**！ ▪ 指定**儲蓄 / 人壽**產品：可享**額外 2%** 保費回贈，最多可享**高達 37%** 保費回贈！ ▪ 指定**保障**產品：可享**額外 1 個月**保費回贈，最多可享**高達 8 個月**保費回贈！
宣傳單張版本及其他資料	 繁體中文版本：連結 英文版本：連結 簡體中文版本：連結

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

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

重要提示	**由即日起，財務策劃顧問經 iPoS 為客戶投保時，請注意「特別要求 > 推廣活動」內關於「投保人是否為友邦退休金/強積金/團體保險成員」之欄位，已更新為必填項目。請於投保時務必選取相關選項。**  **根據友邦保險個人資料收集聲明（PICS），有關友邦保險集團公司在提供任何強積金及公積金相關服務時收集的任何個人資料，該等個人資料只會用於推廣或營銷任何強積金及公積金產品或服務。強積金及公積金客戶的資料是分別用作提供相關強積金或公積金的服務。請注意（一）不應該向其他人士披露客戶的資料作非強積金或公積金職能用途；（二）不應該將客戶的資料用於交叉銷售任何強積金或公積金計劃以外的產品或服務。** **不可直接或間接向客戶提供任何禮物及優待誘使客戶加入友邦強積金及購買友邦保險產品。**

備註：

^只適用於香港。

*若客戶最終未能通過資格審核，客戶只可享 AIA 推廣活動的標準優惠。有關標準優惠詳情，請參閱宣傳單張。

@包括澳門友邦保險退休金僱主計劃（澳門私人退休金計劃和非強制性中央公積金計劃）及非強制性中央公積金個人計劃 。

如有任何查詢，請使用 iEngage/PES Chatbot 或與 IVS 團隊聯絡。

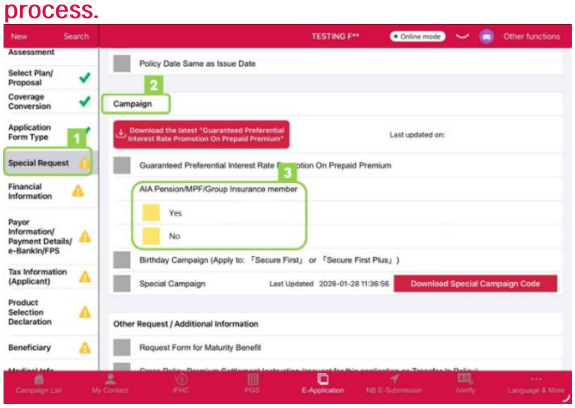
「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

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

The customer eligibility for IVS Exclusive Customer Offer has been updated to: "you need to be (i) an existing AIA MPF^ / Pension@ member on 31 July 2026 and at the time of application or (ii) an existing AIA Group Insurance member at the time of application" **while the offer remains unchanged**. Details are as follows:

Customer Eligibility Update Details*	▪ Existing AIA MPF^/Pension@ members on 31 July 2026 and at the time of application; or ▪ Existing AIA Group Insurance members at the time of application
Offer Details Remain Unchanged	By successfully enrolling in Specified Individual Plans during the promotion period, customers can enjoy the below limited-time extra offer! ▪ Specified Wealth Management / Life Protection Plans: Extra 2% premium refund, with up to 37% premium refund in total! ▪ Specified Protection Plans: Extra 1-month premium refund, with up to 8-month premium refund in total!
Promotion Leaflet Version and Other Information	 Traditional Chinese Version: LINK English Version: LINK Simplified Chinese Version: LINK
Important Note	Effective immediately, when Financial Planners submit applications for customers via iPoS, please note that the field "Whether the applicant is a member of AIA Pension / MPF / Group Insurance" under "Special Request > Campaign" has been updated to a mandatory requirement. Please ensure this section is completed during the application process.  According to AIA Personal Information Collection Statement (PICS), in relation to any personal data collected by AIA whilst providing any services in respect of our mandatory provident fund scheme ("MPF") and occupational retirement schemes ("ORSO"), such personal data would only be used for promoting or marketing any MPF and / or ORSO products or services. Such information obtained is used for performing MPF and / or ORSO functions. Please note that you (a) must not disclose such information to any other person for performing non-MPF and / or non-ORSO functions; (b) must not cross-selling non-MPF and / or non-ORSO products or services by accessing such information. Must not directly or indirectly offer any gifts and incentives to induce customers to join AIA MPF scheme and purchase AIA insurance products.

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

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

Remarks:

^Applicable to Hong Kong only.

*If the eligibility checking cannot be passed, customer will only be entitled to the standard offer in AIA Promotion Campaign. For details of the standard offer, please refer to the promotion leaflet.

@Including AIA Macau Pension Employer Scheme (Macau Private Pension Schemes and Non-Mandatory Central Provident Fund Scheme) and Non-Mandatory Central Provident Fund Individual Scheme.

Should you have any question, please enquire by using iChat in iEngage/PES, or contact our IVS Team for enquiry.

Yours faithfully,

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

「AIA」、「友邦」或「友邦香港」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）。
"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).