AIA Hong Kong

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

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Memo

Attn: All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)

From: Joanne Ma
Head of Underwriting

Co/Dept:

Dept: Operations

Copy: All Department Heads

Date: 20 Aug 2026

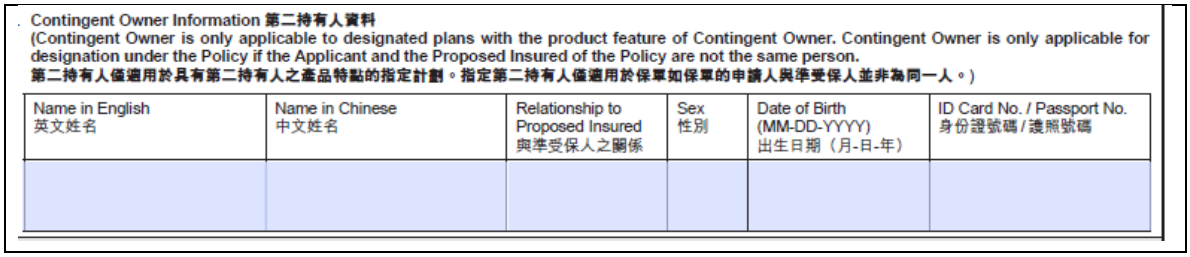
Total page: 4

Subject: (Ref: A260832) 更新《財富系列投保申請書》
Revision of Wealth Series Application Forms

誠如通告 A260840 所述，「財富恆裕」人壽保險計劃3將於2026年8月31日推出。配合是次產品推出，相關《財富系列投保申請書》已作出相應修訂。

表格修訂內容

1. **配合「財富恆裕」人壽保險計劃 3 第二持有人安排**
   新增「第二持有人資料」部份，以配合「財富恆裕」人壽保險計劃 3 之第二持有人(Contingent Owner)安排。相關資料可於適用情況下填寫。



Contingent Owner Information 第二持有人資料
(Contingent Owner is only applicable to designated plans with the product feature of Contingent Owner. Contingent Owner is only applicable for designation under the Policy if the Applicant and the Proposed Insured of the Policy are not the same person.
第二持有人僅適用於具有第二持有人之產品特點的指定計劃。指定第二持有人僅適用於保單如保單的申請人與準受保人並非為同一人。)

Name in English 英文姓名	Name in Chinese 中文姓名	Relationship to Proposed Insured 與準受保人之關係	Sex 性別	Date of Birth (MM-DD-YYYY) 出生日期（月-日-年）	ID Card No. / Passport No. 身份證號碼 / 護照號碼

2. **新增紙本保單合約選項**
   於「特別要求」部份新增「紙本保單合約」選項。除另有註明外，電子保單合約（iContract）將預設為保單合約收取方式。



Special Request 特別要求：

☐ English Contract 英文合約 ☐ Chinese Contract 中文合約

☐ Physical Copy of Policy Contract 紙本保單合約

- Please tick the box if you wish to receive physical copy of Policy Contract. Unless herein specified, iContract will be preselected if applicable.
  如選擇接收紙本保單合約，請在空格內劃上✓。如未有註明，我們將會為閣下預設接收電子保單合約（如適用）。
- "AIA e-Advice" will be preselected and processed subsequently if you wish to receive iContract.
  如接收電子保單合約，我們會同時為閣下預設及辦理「友邦電子通知書」網上服務。
- Valid mobile number and email address are required for iContract. Otherwise, physical copy of Policy Contract will be provided.
  如接收電子保單合約，請提供有效的手提電話號碼及電郵地址。如未能提供，我們將會為閣下提供紙本保單合約。

☐ Others 其他：

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更新表格

表格名稱	現有版本編號	修訂版本編號
財富系列投保申請書	OPUAIF48.0326	OPUAIF48.0826
財富相傳系列投保申請書（只適用於澳門）	OPMCUF27.0326	OPMCUF27.0826

生效日期

更新版本之投保申請書將於 2026 年 8 月 31 日生效。

表格下載及 iPoS 安排

更新版本之投保申請書將於生效日起上載至 Agency Corner。透過 iPoS 遞交之申請將使用系統內之最新版本表格辦理。

過渡安排

為方便業務順利過渡，上述表格之現有版本可繼續使用至2026年9月30日（以投保申請日期計算）。
由2026年10月1日起，所有相關投保申請必須使用更新版本表格辦理。

如有任何查詢，請於 iEngage/PES 使用 Chatbot 進行查詢。澳門地區可親臨營運服務中心查詢。

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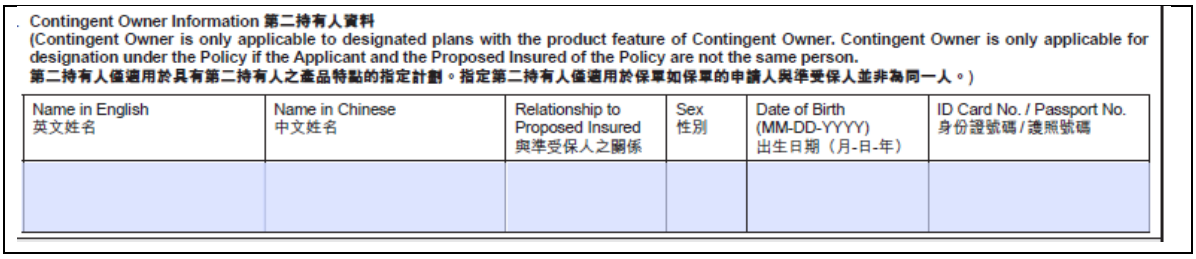
As announced in memo A260840, Wealth Elite Life Insurance Plan 3 will be launched on 31 August 2026. To support the product launch, the relevant Wealth Series Application Forms have been revised accordingly.

Form Revisions

1. **Enhancement to Support the Contingent Owner Arrangement under Wealth Elite Life Insurance Plan 3**
   A new "Contingent Owner Information" section has been added to support the Contingent Owner arrangement under Wealth Elite Life Insurance Plan 3. Relevant information may be completed where applicable.



Contingent Owner Information 第二持有人資料
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Name in English 英文姓名	Name in Chinese 中文姓名	Relationship to Proposed Insured 與準受保人之關係	Sex 性別	Date of Birth (MM-DD-YYYY) 出生日期（月-日-年）	ID Card No. / Passport No. 身份證號碼 / 護照號碼

2. **Addition of Physical Policy Contract Option**
   A new "Physical Copy of Policy Contract" option has been added under the Special Request section. iContract will be preselected as the default policy contract delivery option unless otherwise specified.



Special Request 特別要求：

☐ English Contract 英文合約 ☐ Chinese Contract 中文合約

☐ Physical Copy of Policy Contract 紙本保單合約

- Please tick the box if you wish to receive physical copy of Policy Contract. Unless herein specified, iContract will be preselected if applicable.
  如選擇接收紙本保單合約，請在空格內劃上✓。如未有註明，我們將會為閣下預設接收電子保單合約（如適用）。
- "AIA e-Advice" will be preselected and processed subsequently if you wish to receive iContract.
  如接收電子保單合約，我們會同時為閣下預設及辦理「友邦電子通知書」網上服務。
- Valid mobile number and email address are required for iContract. Otherwise, physical copy of Policy Contract will be provided.
  如接收電子保單合約，請提供有效的手提電話號碼及電郵地址。如未能提供，我們將會為閣下提供紙本保單合約。

☐ Others 其他：

Updated Forms

Form Name	Existing Version Number	Revised Version Number
Wealth Series Application Form	OPUAIF48.0326	OPUAIF48.0826
Wealth Series Application Form (For Macau Use Only)	OPMCUF27.0326	OPMCUF27.0826

Effective Date

The revised application forms will become effective on 31 August 2026.

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Forms Download and iPoS Arrangement
The revised application forms will be uploaded to Agency Corner on the effective date.
For applications submitted via iPoS, the latest version of application forms will be adopted.

Transitional Arrangement
To facilitate a smooth transition, the existing versions of the above forms may continue to be used until 30 September 2026 (based on application date).
Starting from 1 October 2026, all relevant applications must be submitted using the revised form versions.

Should you have any queries, please enquire by using Chatbot in iEngage/PES. For Macau region, please visit Operations Enquiry Counter for details.

Best regards,



Joanne Ma
Head of Underwriting

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