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 / SDDs / DDs / MICs / Agency Leaders / All Financial Planners (Hong Kong and Macau)	From:	Amelie Shen
Copy:	Mr. Alger Fung / Ms. Amelie Shen / Ms. Amy Chan / Mr. Louie Ho / All Department Heads / ABDD Executives / CSBD Agency Executives / IVS Executives	Dept:	Corporate Solutions
Date:	31 August 2026	Total pages:	7

Subject: **(A260881) Group Corporate Solutions – 2027 CS Champions Club 獎項**
Group Corporate Solutions – 2027 CS Champions Club Awards

為表揚所有於企業業務範疇表現傑出的營業同事，集團企業業務誠意推出 **2027 CS Champions Club 獎項**！各地區得獎者將獲邀出席 **2027 年於中國成都舉行的 CS Champions Club 海外業務會議**。有關香港及澳門區域的得獎要求及詳情，請參閱附件。



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 / IVS 團隊聯絡。

祝 業務蒸蒸日上！

To recognise the outstanding producers in all business areas of Corporate Solutions, GCS are pleased to announce the launch of **2027 CS Champions Club Awards**! Awardees from different markets will be invited to attend **the CS Champions Club 2027 in Chengdu, China**. Please refer to the Appendix for the awards details of Hong Kong and Macau market.

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

We wish you every success!

Yours faithfully,

Amelie Shen
Chief Corporate Solutions Officer
AIA Hong Kong and Macau

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15/F, AIA Building,
1 Stubbs Road, Wanchai, Hong Kong

Group Corporate Solutions – 2027 CS Champions Club Awards

我們誠意推出 2027 CS Champions Club Awards，以表揚香港及澳門區內所有於企業業務範疇表現傑出的營業同事。詳情如下：

目的地： **中國成都**
競賽日期： **2026 年 1 月 1 日 – 12 月 31 日**
競賽對象： **所有香港及澳門區域之營業單位主管及財務策劃顧問**

競賽資格及最低要求：

業務範疇	組別	得獎者必須符合下列每項最低要求			
		總 ANP[1,3,4]	總新生意 ANP[2,3,4]	新生意保單數目[3,4]	IVS 保單數目[5-10]
團體保險	首 5 名財務策劃顧問 – 個人業績	HK$ 600,000	HK$ 400,000	2	12
	首 2 名營業主管 – 營業組別業績	HK$ 1,200,000	HK$ 800,000	6	24
	首 3 名區域總監 – 區域業績	HK$ 3,000,000	HK$ 1,200,000	10	100

業務範疇	組別	得獎者必須符合下列每項最低要求		
		總 ANP[11,12]	個人賬戶個案數目[13]	IVS 保單數目[5-10]
退休金	首 5 名財務策劃顧問 – 個人業績	HK$ 2,000,000	25	12
	首 2 名營業主管 – 營業組別業績	HK$ 5,000,000	50	24
	首 3 名區域總監 – 區域業績	HK$ 15,000,000	100	100

業務範疇	組別	得獎者必須符合下列每項最低要求	
		總 IVS FYC[5-10]	IVS 保單數目[5-10]
IVS 友得揀	首 5 名財務策劃顧問 – 個人業績	HK$ 400,000	24
	首 2 名營業主管 – 營業組別業績	HK$ 1,000,000	48
	首 3 名區域總監 – 區域業績	HK$ 4,000,000	200

獎賞：

所有得獎者	▪ **將獲邀出席於中國成都舉行之 2027 CS Champions Club 會議[14]：** • 機票安排：經濟客位來回團體機票一張 • 酒店住宿：安排入住雙人房（每位得獎者佔半房）
組別首 1 名及所有區域總監組別得獎者尊享升級禮遇	▪ 機票安排： **各組別首 1 名（合共 9 個名額）**於 2027 CS Champions Club 成都會議期間之**來回機票**，將可獲**升級至商務客艙**。 ▪ 酒店住宿： **各組別首 1 名及所有區域總監組別得獎者（合共 15 個名額）**於 2027 CS Champions Club 成都會議期間之**酒店住宿**，將可獲**升級至單人房**。

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一般規則及要求：

1) 只計算於競賽日期內成功繳付保費之團體保險新生意 ANP 及團體保險續保生意增長 ANP（不包括保險徵費），包括度身訂造計劃及套裝計劃（惟原有保單轉換、僱員自選產品、LAUGHING「自選牙科保障計劃」、澳門摯開心保障計劃及附加額外保障計劃除外）。
2) 只計算於競賽日期內成功繳付保費之團體保險新生意 ANP（不包括保險徵費），包括度身訂造計劃及套裝計劃（惟原有保單轉換、僱員自選產品、LAUGHING「自選牙科保障計劃」、澳門摯開心保障計劃及附加額外保障計劃除外）。
3) 合資格的團體保險新生意保單必須於競賽日期內獲成功繳付首年保費。
4) 如果合資格團體保險保單屬共同個案（即個案由 2 名或以上營業同事共同完成），同一保單號碼的個案將獲平均分配給每名營業同事，且個案數目將不會以四捨五入方式計算。如果有關獎項以 ANP 計算，每名營業同事獲計算之 ANP 將按比例分配。擁有同一保單編號的團體保險個案，將被視作同一個案計算。
5) IVS「友得揀」保單只計算：
   a. 企業業務成員以保單持有人或受保人身份經以下途徑購買之全新個人保單或指定保單（包括：「友心意」醫療保障計劃、「友愛護」癌症保障計劃及「意安心升級保障」）：
      - 強積金 / 退休金個人賬戶成員：經現有強積金 / 退休金個人帳戶之財務策劃顧問購買
      - 強積金 / 退休金企業成員：經現有負責該強積金 / 退休金企業帳戶之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買
      - 團體保險計劃成員：經現有負責該團體保險計劃之財務策劃顧問，或其同一營業單位之指定財務策劃顧問購買

      而且此企業業務成員 (i) 於投保前上一個日曆月的最後一天、於投保及保單繕發時應為現有友邦強積金 / 退休金成員；或 (ii) 於投保及簽發保單時應為現有友邦團體保險成員。
   b. （只限香港）在職公務員及政府聘用的非公務員（包括立法會秘書處及房屋委員會之員工）及其家屬Δ（配偶及子女）以保單持有人或受保人身份經任何財務策劃顧問購買指定 AIA 自願醫保計劃。

      Δ「家屬」指有關人員的配偶及未滿 21 歲的未婚子女（包括父母已離婚 / 依法分居子女、繼子女、領養子女及非婚生子女）。如果子女是 19 或 20 歲，則必須正在接受全時間教育或全時間職業訓練，或由於身體衰弱或精神欠妥而倚賴有關人員供養。
6) 合資格 IVS「友得揀」保單只計算於競賽期內經 iPoS 遞交及獲繕發之保單。
7) 若營業同事於競賽期之前已遞交相關保單 / 相關保單已獲繕發，並於競賽期內撤回投保申請 / 取消相關保單，其後再次投保相同產品計劃，相關 FYC / 保單數目將不獲計算。
8) 所有由現有保單轉換 / 退保後由同一受保人或同一持有人持有之保單的 FYC / 保單數目將不獲計算。
9) 若保單由兩位或以上營業同事共同完成，相關 FYC / 保單數目將按比例平均分配，而保單數目不會以四捨五入方式計算。
10) 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。
11) 退休金業務 ANP 包括退休金企業業務 ANP 和退休金個人業務 ANP。

    適用於香港區：

    - 退休金企業業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的強積金僱主計劃（MPF）及職業退休計劃（ORSO）之首年供款及由其他受託人轉入相關資產之 10%。
    - 退休金個人業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的「休悠樂」計劃、客戶尊享強積金個人賬戶計劃、AIA 強積金可扣稅自願性供款（「TVC」）計劃及自僱人士計劃之首年供款及由其他受託人轉入相關資產之 10%，並須於 2026 年 12 月 31 日或之前入賬。強積金可扣稅自願性供款計劃之首年供款及資產轉移各自的計算上限均為 ANP HK$60,000，而自僱人士向友邦強積金計劃所作之首年供款及資產轉移計算上限則為 ANP HK$120,000。

    適用於澳門區：

    - 退休金企業業務 ANP 包括於競賽期內成功由 AIA 企業業務部為客戶處理的首年供款及由其他基金管理實體 / 澳門政府管理子賬戶之非強制性中央公積金（「央積金」）僱主計劃和澳門私人退休金(「私退金」) 僱主計劃轉入相關資產之 10%。
    - 退休金個人業務 ANP 包括於競賽期內成功由 AIA 企業業務為客戶處理的首年供款及由其他基金管理實體 / 澳門政府管理子賬戶之央積金和私退金轉入相關資產之 10%，並須於 2026 年 12 月 31 日或之前入賬。
12) 如果申請屬共同個案（即個案由 2 名或以上營業同事共同完成），每名營業同事獲計算之 ANP 將按比例分配。
13) 適用於香港區：合資格個案（UID）是指於競賽期內就自僱人士計劃、「休悠樂」計劃、客戶尊享強積金個人帳戶計劃及強積金可扣稅自願性供款計劃所處理之「退休金個人個案」。

    適用於澳門區：合資格個案（UID）是指於競賽期內就央積金個人計劃所處理之「退休金個人個案」。如個案數目相同，則以 ANP 排名計算。
14) 每名合資格出席 CS Champions Club 會議之得獎者只可獲得一個會議席位。如果營業同事因符合多個業務範疇及競賽級別之資格而獲取超過 1 個獎項，該名合資格得獎者所獲之獎項將以較高級別為先，其後則以較高名次為先。若 2 個獎項名次相同，則以較高業績（與相應的 ANP 或 FYC 最低要求相比）的獎項為先；而該得獎者所獲的其他獎項將由符合該獎項類別的下一位合資格者後補獲取。

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15) 營業同事遞交保單申請予 AIA，應預留充足時間以確保有關申請已於競賽期內獲繕發。

16) 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，不得因獎項而對客戶作特定銷售建議。

17) 排名結果以保單冷靜期後作調整為準。AIA 保留就調整後之排名結果及就任何違規銷售行為追討已發放獎賞之權利。

18) 獎項及嘉許不可轉讓及轉換現金。所有獲獎者必須於獎項及嘉許發放時仍與 AIA 保持有效合約關係。

19) 友邦保留隨時修改本競賽活動規則之權利，恕不另行通知。

20) 如有任何爭議，友邦保留最終決定權。

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Group Corporate Solutions – 2027 CS Champions Club Awards

We are pleased to announce the launch of 2027 CS Champions Club Awards to recognise the outstanding producers in all business areas of Corporate Solutions in Hong Kong and Macau. Details are as follows:

Destination: Chengdu, China
Contest Period: 1 January – 31 December 2026
Eligibility: All Financial Planners and Agency Leaders

Min. Production Requirements:

Qualifying Business Line	Qualifying Group	Qualifiers must meet each of the following Min. Production Requirements			
		Total ANP[1,3,4] (HK$)	New Business ANP[2,3,4] (HK$)	New Business Case Count [3,4]	IVS Case Count[5-10]
Group Insurance	Top 5 Financial Planners – by individual production	600,000	400,000	2	12
	Top 2 Financial Planner – by agency production	1,200,000	800,000	6	24
	Top 3 District Directors – by district production	3,000,000	1,200,000	10	100

Qualifying Business Line	Qualifying Group	Qualifiers must meet each of the following Min. Production Requirements		
		Total ANP[11,12] (HK$)	Retail Case Count[13]	IVS Case Count[5-10]
Pension	Top 5 Financial Planners – by individual production	2,000,000	25	12
	Top 2 Financial Planner – by agency production	5,000,000	50	24
	Top 3 District Directors – by district production	15,000,000	100	100

Qualifying Business Line	Qualifying Group	Qualifiers must meet each of the following Min. Production Requirements	
		Total IVS FYC[5-10] (HK$)	IVS Case Count[5-10]
Individual Voluntary Solutions (IVS)	Top 5 Financial Planners – by individual production	400,000	24
	Top 2 Financial Planner – by agency production	1,000,000	48
	Top 3 District Directors – by district production	4,000,000	200

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Rewards:

All Qualifiers	▪ **Will be invited to join the 2027 CS Champions Club Convention in Chengdu, China[14]:** • Air Ticket Arrangement: One round-trip group ticket on Economy Class • Hotel Accommodations: Twin Room (to be shared by 2 qualifiers)
Exclusive Privileges for Top 1 qualifier in group & All qualifiers in District Directors groups	▪ Air Ticket Arrangement： **Top 1 qualifier in groups (9 quotas in total)** are eligible to **Business Class upgrade** for the **round-trip air ticket** during the 2027 CS Champions Club Convention in Chengdu. ▪ Hotel Accommodations： **Top 1 qualifier in group & All qualifiers in District Directors groups (15 quotas in total)** are eligible to **Single Room upgrade** for the **hotel accommodations** during the 2027 CS Champions Club Convention in Chengdu.

General Rules and Requirements:

1) Only the ANP of Group Insurance new business and the ANP growth of Group Insurance renewal business settled within the Contest Period will be counted (excluding premium levy), including tailor-made plans and packaged plans (excluding conversion from existing policies, employee voluntary plans, LAUGHING, CHEERS Macau and top-up plans).
2) Only the ANP of Group Insurance new business settled within the Contest Period will be counted (excluding premium levy), including tailor-made plans and packaged plans (excluding conversion from existing policies, employee voluntary plans, LAUGHING, CHEERS Macau and top-up plans).
3) Eligible Group Insurance new business policy(ies) must have the first year's premium successfully settled within the Contest Period.
4) If the qualified cases are jointly closed by two or more producers, case count will be evenly shared by each producer under the same policy number. Case count calculation will not be rounded-up accordingly. If the reward is calculated by ANP, the ANP allocated for each producer will be shared proportionally. Group Insurance Case(s) registered under the same policy number will be counted as one Group Insurance Case.
5) Individual Voluntary Solutions (IVS) policy is qualified only if:
   a. Corporate Solutions members purchase a new personal insurance policy or designated policy (including StepUp Medical Protection Plan 2, Shield Up Cancer Protection Plan and Secure First Plus) as policyholder or insured through the following channels:
      • MPF/pension personal account members: Purchase through the existing financial planner of the MPF/pension personal account.
      • MPF/pension corporate members: Purchase through the existing financial planner currently responsible for the MPF/Pension corporate account, or assigned financial planners of the same agency unit.
      • Group insurance plan members: Purchase through the existing financial planner currently responsible for the group insurance account, or assigned financial planners of the same agency unit.

      and such Corporate Solutions member should be (i) an existing AIA MPF/Pension member on the last day of previous calendar month upon application, at the time of application and policy issuance; or (ii) an existing AIA Group Insurance member at the time of application and policy issuance.
   b. (For Hong Kong only) Serving civil servants and non-civil servants employed by the Government (including staff members of Legislative Council Secretariat and Housing Authority) and their families$^{\Delta}$ (spouse and children) purchase a specified AIA Voluntary Health Insurance Scheme as policyholder or insured through any financial planner.

      $^{\Delta}$ "Family" means the officer's spouse and children (including children of divorced/legally separated officers, step-children, adopted children and illegitimate children) who are unmarried and under the age of 21. In the case of children aged 19 or 20, they must also be in full time education or in full time vocational training, or dependent on the officer as a result of physical or mental infirmity.
6) Eligible IVS policies will only be counted if they are submitted via iPoS and issued within the Contest Period.
7) Financial Planners who have submitted policies/policies issued before the Contest Period and then reapply for the same products with the same insured, the corresponding FYC/policies will NOT be counted.
8) The relevant FYC/policy count of policy changed/lapsed from existing policies of the same policyholder or insured will NOT be counted.
9) If the policy is jointly completed by two or more Financial Planners, the relevant FYC/Policy Count will be evenly shared in proportion while Policy Count will not be rounded-up.
10) All new policies purchased under the same insured for the same basic plan and same premium payment period during the Contest Period will be counted as one policy.
11) Pension Business ANP includes both Pension Corporate business ANP and Pension Retail business ANP.

    Applicable to Hong Kong:

    • Pension Corporate business ANP includes the Total First Year Contribution and 10% of relevant Assets Taken Over ("ATO) transferred from other trustees for MPF Employer Plan and ORSO Employer Plan successfully settled by AIA Corporate Solutions within the Contest Period.
    • Pension Retail business ANP includes the Total First Year Contribution and 10% of relevant ATO transferred from other trustees for AIA MPF Personal Account ("MPFPA"), Preferential Deferred Member ("PDM") account, AIA MPF Tax Deductible Voluntary Contribution Account ("TVC") and Self-Employed Person ("SEP") Plan successfully settled by AIA Corporate Solutions within the Contest Period on or before 31 December 2026. The total crediting limit of First Year Contribution and ATO for each TVC account is HK$60,000 in ANP production per category. The total crediting limit of First Year Contribution and ATO made by each SEP account to the AIA MPF scheme is HK$120,000 in ANP production.

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Applicable to Macau:

- Pension Corporate business ANP includes the Total First Year Contribution and 10% of relevant ATO from other fund management entities or government-managed sub-accounts of Non-Mandatory Central Provident Fund ("CPF") Scheme Employer Plan and Private Pension Fund ("PPF") Scheme Employer Plan successfully settled by AIA Corporate Solutions within the Contest Period.
- Pension Retail business ANP includes the Total First Year Contribution and 10% of relevant ATO from other fund management entities or government-managed sub-accounts of CPF and PPF successfully settled by AIA Corporate Solutions within the Contest Period on or before 31 December 2026.

12) If the qualified cases are jointly closed by two producers, the ANP allocated for each producer will be shared in proportion.

13) Applicable to Hong Kong: An eligible case (Unique Identification - UID) refers to a "Pension Retail Case" processed for MPFPA account, PDM account, TVC account and SEP Plan during the Contest period. In case the case count number is the same, it will be ranked by ANP production.

    Applicable to Macau: An eligible case (UID) refers to a "Pension Retail Case" processed for central provident fund account during the Contest period. In case the case count number is the same, it will be ranked by ANP production.

14) Each eligible qualifier will be awarded with one seat only to attend the CS Champions Club Convention. If a producer is qualified for more than one award by qualifying for multiple business areas and levels, the higher-level award will be granted first, followed by the higher-ranking award. If the ranking of two awards is the same, the award with higher performance (compared to the relevant minimum ANP or FYC requirements) will be granted first; the other award(s) gained by this qualifier will then be granted to the next eligible qualifier(s) in the respective category.

15) For case applications submitted to AIA, Financial Planners are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorised vendor before the cut-off time.

16) Financial Planners should make product recommendation based on customer needs and affordability and should not make any award-driven recommendation to customers.

17) The ranking results are subject to adjustments after the policy cooling-off period. AIA reserves the right to retract the rewards based on the adjusted ranking results and any substantiated violation of sales conduct.

18) The award and recognition are not transferrable and cannot be exchanged for cash. Qualifiers must be in-force with AIA when the awards and recognitions are presented.

19) AIA reserves the right to amend this Contest and the rewards at any time without prior notice.

20) In case of any disputes, AIA reserves the right for any final decision.

Yours faithfully,

Andrew Merrilees
Chief Executive Officer
Group Corporate Solutions

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