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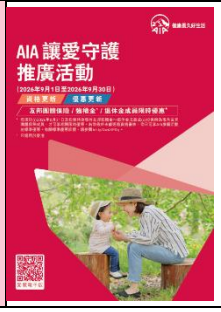
Memo

Attn:	All EDD & Honourable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners	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 September 2026	Total pages:	4 + Appendix

Subject: **(A260906) AIA 讓愛守護推廣活動 – 友邦團體保險 / 強積金 / 退休金成員限時優惠（2026 年 9 月）**
AIA Protecting with Love Promotion Campaign – Limited-time Offer for AIA Group Insurance / MPF / Pension members (September 2026)

踏入 9 月份，企業業務繼續誠意推出 **AIA 讓愛守護推廣活動之 IVS「友得揀」客戶尊屬優惠**。請各營業同事細閱以下之優惠詳情，把握 IVS 推廣良機！

推廣期	2026 年 9 月 1 日至 9 月 30 日	
合資格客戶*	▪ 於 2026 年 8 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	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 42%** 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	有關 IVS 客戶最新尊屬優惠與標準優惠之比較，請參閱 **附件 1 – 產品優惠比較一覽表**（只供內部參考）

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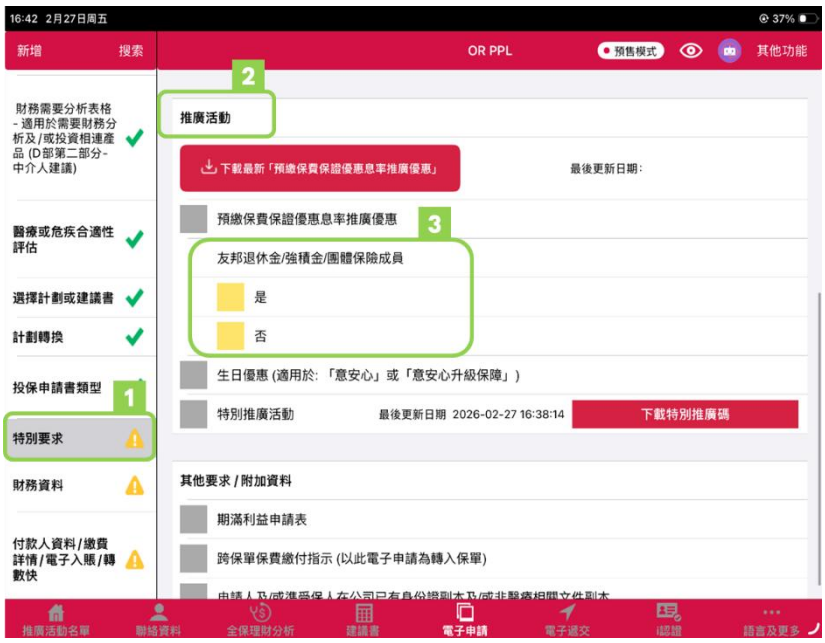
重要更新	**由即日起，財務策劃顧問經 iPoS 為客戶投保時，請注意「特別要求 > 推廣活動」內關於「投保人是否為友邦退休金/強積金/團體保險成員」之欄位，已更新為必填項目。請於投保時務必選取相關選項。** 
重要提示	**根據友邦保險個人資料收集聲明（PICS），有關友邦保險集團公司在提供任何強積金及公積金相關服務時收集的任何個人資料，該等個人資料只會用於推廣或營銷任何強積金及公積金產品或服務。強積金及公積金客戶的資料是分別用作提供相關強積金或公積金的服務。請注意（一）不應該向其他人士披露客戶的資料作非強積金或公積金職能用途；（二）不應該將客戶的資料用於交叉銷售任何強積金或公積金計劃以外的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

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Stepping into September, Corporate Solutions continues to launch the **AIA Protecting with Love Promotion Campaign - IVS Exclusive Customer Offer**. Please refer to the below offer details and seize the IVS promotion opportunity!

Promotion Period	**1 – 30 September 2026**	
Eligible Customers*	▪ Existing AIA MPF^/Pension@ members on **31 August 2026** and at the time of application; or ▪ Existing AIA Group Insurance members at the time of application	
Offer Details	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 42%** 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	For comparison of the latest IVS Exclusive Customer Offer and the public offer, please refer to **Appendix 1 - Product Offer Comparison Table** (For internal use only)

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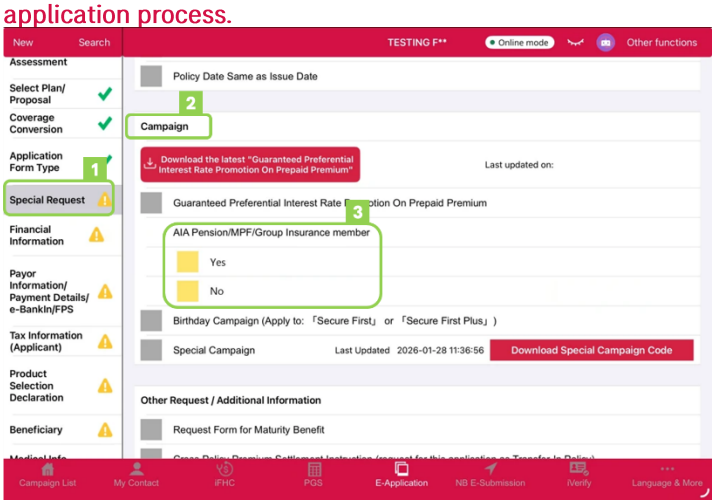
Important Update	Effective immediately, when Financial Planners submit applications for customers via iPoS, please note that the field "Whether the applicant is a member of AIA Pension / MPF / Group Insurance" under "Special Request > Campaign" has been updated to a mandatory requirement. Please ensure this section is completed during the application process. 
Important Note	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.

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

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附件 1：產品優惠比較一覽表

類別	產品	IVS 優惠 Vs 標準優惠 是否可享更高回贈
AIA 自願醫保計劃	AIA 自願醫保標準計劃#@ AIA 自願醫保靈活計劃#@ AIA 自願醫保尊耀計劃#@ AIA 自願醫保睿選計劃#@	✓ **+1 個月**保費回贈
醫療保障	「尊耀」醫療計劃@^ 「尊耀明珠」醫療計劃@ 「睿選」醫療計劃@^ 「睿選明珠」醫療計劃@	✓ **+1 個月**保費回贈
危疾保障	「簡護危疾保」@ 「進添」保險計劃 - 癌症保障* 「多重智倍」危疾保險計劃*# 「泰然安心」危疾保險計劃 2*# 「多重安心」危疾保險計劃 2*# 「進泰安心」危疾保險計劃 2*# 「愛伴航」保險計劃 2 系列*¶ 「簡緻 • 愛伴航」保險計劃*	✗
意外保障	「自選人身意外保險 3」Δ 「銀意保」* 「意安心升級保障」* 「意安心」* 「童年意家保」* 「盛年意家保」* 「豐年意家保」*	✗
人壽保障	「守康易定期壽險計劃」*	✗

只適用於香港。有關完整產品資料，請參閱 aia.com.hk。
@ 可以基本計劃形式獨立投保或作附加契約。
* 只可以基本計劃形式投保。
^ 只適用於澳門。
¶「愛伴航」保險計劃 2 系列包括： i.「愛伴航」保險計劃 2； ii.「愛伴航 – 首護摯寶」保險計劃 2。
Δ 只可以附加契約形式投保。

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附件 1：產品優惠比較一覽表（續）

類別	產品	保費繳付期 / 最低保費要求	IVS 優惠 Vs 標準優惠 是否可享更高回贈
儲蓄保險	盈御多元貨幣儲蓄保險計劃 3*■~ 「簡愛．延續」儲蓄保險計劃 5*~	5 / 10 年	✓ +2% 保費回贈
	環宇盈活儲蓄保險計劃*µ~ 財富盈活儲蓄保險計劃*µ~	5 年	✓ +2% 保費回贈
	盈御多元貨幣儲蓄保險計劃 3* 環宇盈活儲蓄保險計劃* 「簡愛．延續」儲蓄保險計劃 5*π 財富盈活儲蓄保險計劃*µ~	一次性繳付保費	✗
	AIA 延期年金計劃 2*+♦	年度化保費 5,000 美元或以上	✗
人壽保險	「活然人生」保險計劃*	5 / 30 年	✓ +2% 保費回贈
定期壽險附加契約	摯誠定期壽險附加契約@ 尊誠定期壽險附加契約@	-	✗

* 只可以基本計劃形式投保。

■ 適用於所有貨幣之保單（即人民幣、英鎊、美元、澳元、加元、港元、澳門幣（只適用於澳門繕發的保單）、歐元及新加坡元）。

~ 若保單以美元以外的貨幣繕發，請參閱宣傳單張內之條款及細則 12 及 13 有關其他貨幣適用之保費金額。

\+ 只適用於香港。

µ 適用於以下貨幣（即美元、港元、澳門幣（只適用於澳門繕發的保單））。

@ 只可以作附加契約。

π 若保單以美元以外的貨幣繕發，請參閱條款及細則 17 有關其他貨幣適用之保費金額。

♦ 此保費回贈優惠不可與其他推廣優惠同時使用(包括但不限於電子保費優惠券，及/或透過 AIA 僱員保險購買計劃(EIPP)投保 AIA 延期年金計劃 2 所享有之推廣優惠，如適用)。電子保費優惠券不適用於 AIA 延期年金計劃 2。

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Appendix 1：Product Offer Comparison Table

Category	Products	IVS Offer Vs Standard Offer Is it better?
AIA Voluntary Health Insurance Scheme	AIA Voluntary Health Insurance Standard Scheme#@ AIA Voluntary Health Insurance Flexi Scheme#@ AIA Voluntary Health Insurance Privilege Ultra Scheme#@ AIA Voluntary Health Insurance SelectWise Scheme#@	✓ +1 Month Premium Refund
Medical Protection	Privilege Ultra Medical Plan@^ Privilege Ultra Pearl Medical Plan@ SelectWise Medical Plan@^ SelectWise Pearl Medical Plan@	✓ +1 Month Premium Refund
Critical Illness Protection	Simple Care Essence@ Level-Up Protect Cancer Insurance Plan* Smart Elite Ultra Critical Illness Insurance Plan*# Executive Care Pro Critical Illness Insurance Plan 2*# Multiple Care Pro Critical Illness Insurance Plan 2*# Prime Care Pro Critical Illness Insurance Plan 2*# On Your Side Insurance Plan 2 Series*¶ Essence – On Your Side Insurance Plan*	✗
Accident Protection	PAC Select 3Δ Silvery Protect* Secure First Plus* Secure First* Super Kids Shield* Super Adults Shield* Super Seniors Shield*	✗
Life Protection	EasyGuard Term Life Plan*	✗

Available in Hong Kong only. For complete product information, please refer to aia.com.hk.
@ Can be purchased as a basic plan or as a rider.
* Can only be purchased as a basic plan.
^ Available in Macau only.
¶ On Your Side Insurance Plan 2 Series includes: i. On Your Side Insurance Plan 2; ii. On Your Side Insurance Plan 2 – First Gift.
Δ Can only be purchased as a rider.

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Appendix 1：Product Offer Comparison Table (Cont.)

Category	Products	Premium payment period/ Min. premium requirements	IVS Offer Vs Standard Offer Is it better?
Savings Insurance	Global Power Multi-Currency Savings Insurance Plan 3*■~ Simply Love Encore Savings Insurance Plan 5*~	5 / 10-year	✓ +2% Premium Refund
	GlobalFlexi Savings Insurance Plan*μ~ Wealth Flexi Savings Insurance Plan*μ~	5-year	✓ +2% Premium Refund
	Global Power Multi-Currency Savings Insurance Plan 3* GlobalFlexi Savings Insurance Plan* Simply Love Encore Savings Insurance Plan 5*π Wealth Flexi Savings Insurance Plan*μ~	One-Time Premium Payment	✗
	AIA Deferred Annuity Plan 2 *+♦	Annualised Premium US$ 5,000 or above	✗
Life Insurance	ProsperLife Insurance Plan*	5 / 30-year	✓ +2% Premium Refund
Term Life Supplementary Contract	Wisdom Term Life Supplementary Contract@ Expert Term Life Supplementary Contract@	-	✗

* Can only be purchased as a basic plan.

■ Applicable to all currencies available for policies, i.e. Renminbi (RMB), British pound sterling (GBP), US dollar (US$), Australian dollar (AUD), Canadian dollar (CAD), HK dollar (HK$), Macau pataca (MOP; only for policies issued in Macau), Euro (EUR) and Singapore dollar (SGD).

~ If the policy is issued in a currency other than US$, please refer to 12 and 13 under Terms & Conditions in the promotion leaflet for the applicable premium amount in other currencies.

\+ Available in Hong Kong only.

μ Applicable to the following currencies available for policies, i.e. US dollar (US$), HK dollar (HK$), Macau pataca (MOP; only for policies issued in Macau).

π If the policy is issued in a currency other than US$, please refer to 17 under Terms & Conditions for the applicable premium amount in other currencies.

@ Can only be purchased as a rider.

♦ This premium refund offer cannot be used in conjunction with other marketing offers (including but not limited to ePremium Coupon, and/or the promotional offer of applying AIA Deferred Annuity Plan 2 via AIA Employee Insurance Purchase Programme (EIPP), if applicable). ePremium Coupon is not applicable to AIA Deferred Annuity Plan 2.

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