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)	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	Dept:	Corporate Solutions
Date:	15 September 2026	Total pages:	4

Subject: **(A260934) 2026 強積金個人個案極速雙重賞**
2026 AIA MPF (Personal Account) Rewards: Fast-Track Double Rewards

迎接 2026 年業務高峰，全力衝刺強積金（個人賬戶）市場！**只要於競賽期內達成指定個案數目，即可同時解鎖高達 HK$34,500 現金獎賞及贏取人氣 AIA 經典大型活動門票！**立即把握黃金機會，實現業績與獎賞雙雙豐收！詳情如下：

競賽資格	所有持有強積金附屬中介人牌照的營業同事
競賽日期	**2026 年 9 月 14 日至 12 月 31 日**
獎賞 1：現金大激賞	
獲獎資格及獎賞	於競賽期內，只要**成功完成強積金個人個案[1-3]數目**（詳情見下表），將可獲得相應現金賞。

個案數目	現金獎賞 (上限為HK$23,000)
2 - 4.5	HK$300
5 – 7.5	HK$1,000
8 – 9.5	HK$2,000
10	HK$3,000
10 宗以上	每宗額外HK$500現金賞

!!額外獎金加乘獎賞!!

於競賽期內，若完成合資格**僱員自選安排（ECA）**個案[1-2]並達指定數目，總現金獎賞可獲額外加乘：

ECA 個案[1-2]數目	獎金倍數
5 – 9.5	1.1
10 – 19.5	1.25
20 或以上	1.5

最多可享 HK$34,500 現金獎賞

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例子

完成個案	現金獎賞	合資格 ECA 個案[1-2]數目	獎金加乘	總現金獎賞（現金獎賞 x 獎金加乘）
4	HK$300	3	-	**HK$300**
5	HK$1,000	5	1.1	**HK$1,100**
9	HK$2,000	20	1.5	**HK$3,000**
15	HK$5,500	10	1.25	**HK$6,875**
30	HK$13,000	4	-	**HK$13,000**
50	HK$23,000（最高上限）	25	1.5	**HK$34,500**

獎賞 2：AIA 星級活動門票賞

獲獎資格及獎賞

於競賽期內，每成功**完成 3 宗強積金個人個案[3-5]**將可獲得**「AIA 經典大型活動門票連 10 個代幣」1 張（價值 HK$150）**

!! 合資格僱員自選安排（ECA）個案[4-5]數目可獲 1.5 倍加乘計算 !!

計算方式
強積金個人個案[3-5]數目（不包括合資格 ECA 個案數目）+ 合資格 ECA 個案[4-5]數目乘以 1.5 倍
↓
總個案數目除以 3（向下取整）

有關獎賞將分兩個階段發放，並設有不同的業績截止日：

- 第一階段：2026 年 9 月 14 日至 11 月 30 日
  - 結算此階段成功完成的個案，並依計算方式發放第一階段門票。
- 第二階段：2026 年 12 月 1 日至 12 月 31 日
  - 第二階段結束後，將合併計算整個競賽期內（即第一階段及第二階段）累積之總個案數目，算出整個競賽期合共可獲的總門票張數。第二階段實際獲發之門票張數，將根據該總數減去第一階段已發放的門票張數作結算。

共 2,500 張
先到先得 送完即止

例子

第一階段（2026 年 9 月 14 日至 11 月 30 日）

- 強積金個人個案[3-5]數目（不包括合資格 ECA 個案數目）：2 宗
- 合資格 ECA 個案[4-5]數目：3 宗 × 1.5 倍 = 4.5 宗
  第一階段總個案數：2 宗 + 4.5 宗 = 6.5 宗
- **第一階段可獲門票**：6.5 ÷ 3 = **2 張門票**（向下取整）

第二階段（2026 年 12 月 1 日至 12 月 31 日）

- 強積金個人個案[3-5]數目（不包括合資格 ECA 個案數目）：3宗
- 合資格 ECA 個案[4-5]數目：3 宗 × 1.5 倍 = 4.5 宗
- 第二階段總個案數：3 宗 + 4.5 宗 = 7.5 宗

【最終結算】整個競賽期總計

- 整個競賽期累積總個案數：6.5 宗（第一階段）+ 7.5 宗（第二階段）= 14 宗
- 合共可獲總門票：14 ÷ 3 = 4 **張門票**（向下取整）
- **第二階段可獲門票：4 張（總門票）- 2 張（第一階段已發放）** = 2 張門票

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備註：

1. 合資格強積金個人個案（Unique Identification - UID）只計算每宗於推廣期內成功遞交之 P(P) / P(M) / P(C) 的表格申請至「積金易」平台，由其他受託人轉移新強積金資產至 AIA 企業業務部（CS）的「休悠樂」個人賬戶計劃（MPFPA），並須於 2027 年 1 月 31 日或之前由 CS 完成該資產轉移。
2. 合資格強積金個人賬戶個案（UID）只計算於競賽期內成功完成開戶，並於 2027 年 1 月 31 日或之前完成及遞交「強積金客戶聲明及同意書」之個案。
3. 如合資格強積金個人賬戶個案（UID）已於「強積金個人個案「雙重跨年」現金賞」（通告 A251230）/「『積』金倍數大激賞」（通告 A260448）/「2026 退休金 x IVS 珠海『憩』刻尊尚饗樂之旅」競賽」（通告 A260531）計算在內，該個案將不會再計入本次競賽。
4. 合資格強積金個人個案（Unique Identification - UID）只計算每宗於推廣期內成功遞交之 P(P) / P(M) / P(C) 的表格申請至「積金易」平台，由其他受託人轉移新強積金資產至 AIA 企業業務部（CS）的「休悠樂」個人賬戶計劃（MPFPA），並須於 2026 年 12 月 31 日或之前由 CS 完成該資產轉移。
5. 合資格強積金個人賬戶個案（UID）只計算於競賽期內成功完成開戶，並於 2026 年 12 月 31 日或之前完成及遞交「強積金客戶聲明及同意書」之個案。
6. 營業同事於從事強積金銷售及推廣活動，以及為有關強積金計劃提供意見時，必須正確地為客戶填選最新之相關申請表格，以獲得客戶以書面及明示同意該註冊強積金中介人將就有關個案所獲得之金錢利益及 / 或非金錢利益。詳情請參閱通告 A240263。
7. 於競賽期內，以同一香港身份證號碼（UID）登記之賬戶，只計算為一宗強積金個人賬戶個案。
8. 如果合資格個案屬共同個案（即個案由 2 名營業同事共同完成），每名營業同事將獲計算 0.5 宗個案。且個案不會以四捨五入方式計算。獎賞將按比例平均分配。
9. 得獎營業同事必需於發放獎賞期間仍與公司維持有效合約關係，方能獲獎。
10. AIA 保留就調整後之得獎結果及就任何違規銷售行為追討已發放獎賞之權利。
11. AIA 保留隨時修改本競賽規則或獎賞之權利，恕不另行通知。
12. 如有任何爭議，AIA 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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Gear up for the 2026 business peak and go all out for the MPF (Personal Account) business! **Achieve the designated case count during the competition period to unlock up to HK$34,500 in cash rewards and win tickets to popular AIA signature mega events!** Seize this golden opportunity now to boost your sales and maximize your rewards! Details are as follows:

Eligibility	All MPF Licensed Financial Planners
Challenge Period	**14 September – 31 December 2026**

Reward 1: Mega Cash Rewards

Qualifying Criteria and Rewards

During the Challenge Period, simply **achieve the designated number of MPF Personal Account cases**[1-3] (see table below for details) to receive the corresponding cash rewards.

Number of Case	Cash Reward (Capped at HK$23,000)
2 - 4.5	HK$300
5 – 7.5	HK$1,000
8 – 9.5	HK$2,000
10	HK$3,000
Over 10	Additional HK$500 cash reward per case

!! Extra Bonus Multiplier Reward!!

During the Challenge Period, you can enjoy an additional multiplier on your total cash reward by achieving the designated number of eligible **Employee Choice Arrangement (ECA)** cases[1-2].

ECA Case[1-2] Count	Bonus Multiplier
5 – 9.5	1.1
10 – 19.5	1.25
20 or above	1.5

Enjoy a maximum cash reward of up to HK$34,500!

Example

Cases Completed	Cash Reward	Eligible ECA Case[1-2] Count	Bonus Multiplier	**Total Cash Reward (Cash Rewards x Bonus Multiplier)**
4	HK$300	3	-	**HK$300**
5	HK$1,000	5	1.1	**HK$1,100**
9	HK$2,000	20	1.5	**HK$3,000**
15	HK$5,500	10	1.25	**HK$6,875**
30	HK$13,000	4	-	**HK$13,000**
50	HK$23,000 (Maximum Cap)	25	1.5	**HK$34,500**

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<table>
<tr><th colspan="2">Reward 2: AIA Signature Event Ticket Reward</th></tr>
<tr><td>Qualifying Criteria and Rewards</td><td>
During the Challenge Period, for every 3 successfully completed MPF Personal Account cases[3-5], 1 “AIA Signature Large Scale Event Admission Ticket with 10 tokens” (valued at HK$150) will be rewarded.

!! Eligible Employee Choice Arrangement (ECA) cases[4-5] will be calculated with a 1.5x multiplier !!

<table>
<tr><th>Calculation Method:</th></tr>
<tr><td>Number of MPF Personal Account cases[3-5] (Excluding eligible ECA cases) + (Eligible ECA cases[4-5] × 1.5x multiplier)</td></tr>
<tr><td>↓</td></tr>
<tr><td>Total case count divided by 3 (rounded down)</td></tr>
</table>

The rewards will be distributed in two phases with respective results cut-off dates:
• Phase 1: 14 September 2026 – 30 November 2026
➢ Successfully completed cases within this period will be settled, and Phase 1 tickets will be distributed based on the calculation method.
• Phase 2: 1 December 2026 – 31 December 2026
➢ Upon the end of Phase 2, the accumulated total number of cases across the entire Challenge period (i.e., Phase 1 and Phase 2 combined) will be calculated to determine the total number of tickets eligible for the entire period. The actual number of tickets to be received in Phase 2 will be settled by subtracting the tickets already distributed in Phase 1 from that overall total.

Total 2,500 Tickets
First Come, First Served while Supplies Last
</td></tr>
<tr><td>Example</td><td>
<u>Phase 1 (14 September – 30 November 2026)</u>
• Number of MPF Personal Account[3-5]Cases(Excluding eligible ECA cases): 2 cases
• Eligible ECA[4-5] Cases: 3 cases × 1.5 multiplier = 4.5 cases
• Phase 1 Total Case Count: 2 cases + 4.5 cases = 6.5 cases
• Phase 1 Tickets to be received: 6.5 ÷ 3 = <u>2 tickets</u> (rounded down)
<u>Phase 2 (1 December – 31 December 2026)</u>
• Number of MPF Personal Account[3-5]Cases(Excluding eligible ECA cases): 3 cases
• Eligible ECA[4-5] Cases: 3 cases × 1.5 multiplier = 4.5 cases
• Phase 2 Total Case Count: 3 cases + 4.5 cases = 7.5 cases
<u>【Overall Calculation】Entire Challenge Period Summary</u>
• Accumulated Total Case Count: 6.5 cases (Phase 1) + 7.5 cases (Phase 2) = 14 cases
• Total Tickets Entitled Overall: 14 ÷ 3 = 4 Tickets (Rounded Down)
• Phase 2 Actual Tickets to be Received: 4 Tickets (Total) - 2 Tickets (Distributed in Phase 1) = <u>2 tickets</u>
</td></tr>
</table>

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Remarks:

1. Qualified MPF Retail Cases (Unique Identification – UID) will be counted for each MPF Personal Account case with completed P(P) / P(M) / P(C) form is submitted to eMPF Platform within the Promotion Period, with Asset Taken Over ("ATO") from external trustees to AIA MPF Personal Account ("MPFPA") and successfully settled by AIA Corporate Solutions on or before 31 January 2027.
2. Qualified Personal Account Cases (UID) will be counted if accounts are successfully opened during the Challenge Period with completing and submitting "MPF Customer Declaration and Consent Form" on or before 31 January 2027.
3. If Qualified Personal Account Cases (UID) have been counted under the "MPF PA Cases "Dual-Year" Cash Bonus" (Memo A251230) / "MPF Multiplier Mega Reward" (Memo A260448) / "2026 Pension x IVS Zhuhai Refined Fun Trip Contest" (Memo A260531), the UID will not be counted in this Challenge.
4. Qualified MPF Retail Cases (Unique Identification – UID) will be counted for each MPF Personal Account case with completed P(P) / P(M) / P(C) form is submitted to eMPF Platform within the Promotion Period, with Asset Taken Over ("ATO") from external trustees to AIA MPF Personal Account ("MPFPA") and successfully settled by AIA Corporate Solutions on or before 31 December 2026.
5. Qualified Personal Account Cases (UID) will be counted if accounts are successfully opened during the Challenge Period with completing and submitting "MPF Customer Declaration and Consent Form" on or before 31 December 2026.
6. When Financial Planners are conducting MPF sales and marketing activities and giving advice in relation to MPF schemes, you must correctly complete the latest relevant application forms for your customers in order to obtain their written and express consent to the monetary and/or non-monetary benefits to be received by the registered MPF intermediary in respect of the relevant cases. For details, please refer to memo A240263.
7. During the Challenge Period, only one Personal Account Case will be counted for each HKID number (UID) registered.
8. If the qualifying case is jointly closed by 2 producers, 0.5 case will be counted for each producer. Case count calculation will not be rounded-up. The cash bonus will be evenly shared in proportion.
9. The qualifier must be in-force with AIA at the time of reward distribution in order to enjoy the rewards.
10. AIA reserves the right to retract the rewards awarded in respect of the adjusted results of final sales report and for any sales violations.
11. AIA reserves the right to amend the rules or rewards of this Challenge at any time without prior notice.
12. In case of any disputes, AIA reserves the right for any final decision.

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



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

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