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健康長久好生活

Memo

Attn	:	All EDD & Honourable Advisors/ EDDs/ PSDDs/ SDDs/ DDs/ MICs/ Agency Leaders/ Financial Planners (Hong Kong and Macau)	From	:	Amy Chan
Co/Dept	:	Mr. Alger Fung/ Mr. Louie Ho/ All Department Heads/ ABDD Executives	Dept	:	Management Team
Date	:	25 September 2026	Total page	:	5
Subject	:	**(A260968)**	**2026 為自己保障+1 財務策劃顧問限時優惠排名挑戰賽** **2026 Protection+1 Ranking Challenge for Financial Planner Limited-time Offer**		

「財務策劃顧問限時優惠」推出以來反應熱烈，不少同事已率先把握機會，為自己及家人增添更全面保障，以行動實踐「保障由自己開始」。

為延續這股熱潮，公司特別推出「**2026為自己保障+1 財務策劃顧問限時優惠排名挑戰賽**」，鼓勵財務策劃顧問、營業單位主管及區域總監上下同心積極參與。凡完成「2026財務策劃顧問限時優惠」合資格保單的營業同事，將以保單數目或年化新保費 (ANP) 排名，相關排名得獎者將於一年一度最大型的傑出壽險從業員頒獎典禮 (AAP) 獲得嘉許。

把握限時優惠，為自己及家人保障+1；挑戰最高榮譽，成就非凡佳績！

Beyond No.1 全心為客 堅守使命

有關競賽詳情請參閱下文。
For details, please refer to the contest information below.





Amy Chan
Chief Agency Officer
Agency Distribution
Hong Kong and Macau
AC/AL/CC/JW

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2026為自己保障+1 財務策劃顧問限時優惠排名挑戰賽

競賽資格

所有財務策劃顧問及營業單位主管

競賽日期

2026年9至10月 (2個月)

競賽要求及獎賞

競賽期內，**凡完成「2026財務策劃顧問限時優惠」的合資格保單**，將按保單數目或年化新保費 (ANP) 進行排名；只要達到相關排名，得獎者將於傑出壽險從業員頒獎典禮(AAP) 獲得嘉許。

競賽類別		業績計算	競賽要求：完成「2026財務策劃顧問限時優惠」的合資格保單	排名	獎賞
(1)	頂尖傑出區域 (PGDOY)	按區域計算	相關保單之保單數目	首1名	得獎者將於傑出壽險從業員頒獎典禮(AAP) 獲得嘉許
(2)	超級傑出區域 (SGDOY)			首1名	
(3)	傑出區域 (GDOY)			首1名	
(4)	最佳區域 (DOY)			首1名	
(5)	營業單位主管	按直屬營業單位計算		首3名	
(6)	財務策劃顧問	按個人計算	相關保單之年化新保費 (ANP)	首3名	

備註

1. 「2026 財務策劃顧問限時優惠」合資格保單包括以下產品；有關詳情，請參閱通告 A260949。

環宇盈活儲蓄保險計劃	財富盈活儲蓄保險計劃
「財富恆裕」人壽保險計劃	「活然人生」保險計劃
AIA 自願醫保尊耀計劃	AIA 自願醫保睿選計劃
「尊耀」醫療計劃	「睿選」醫療計劃
「愛伴航」保險計劃 2 系列（只限 18 年或 25 年保費繳付期）	

2. 保單數目時只計算基本計劃，不包括附加契約。
3. 若同一類別之保單數目出現相同排名，公司將以合資格保單的年化新保費 (ANP) 再作排名。
4. 得獎者需達到維持合約的最低要求；詳情請參閱「報酬及福利手冊」。
5. 區域資格及類別以 2026 年度大獎區域為準——只適用於 2026 年 1 月 1 日或之前獲委任的區域總監，並擁有上一銷售年度整年業績紀錄方符合資格，不包括本年度新加入的區域。有關 2026 年度大獎區域類別，請查閱於 2026 年 6 月所發出的相關電郵。
6. 此競賽結果將不接受上訴申請。

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一般規則：

1. 若以一次性繳付保費方式投保的新保單，年化新保費（「ANP」）將按實際繳交保費金額的 10%計算。如保單享有「2026 財務策劃顧問限時優惠」下的保費折扣，ANP將按折扣後保費金額計算，計算公式如下：
   ANP = 一次性繳付保費金額 × (100% – 適用保費折扣率) × 10%。對於以定期繳費方式投保的新保單，ANP將按保單標準保費計算，並不會因任何適用保費回贈而作出調整。
2. 如營業同事於競賽期之前已遞交保單/保單已獲繕發，但於競賽期內撤回投保申請/取消保單，並再次投保相同產品計劃，其保單將不獲計算。
3. 所有由現有保單轉換/退保後同一受保人之保單將不獲計算。
4. 競賽期完結時，若保單數目總數為點數，數目將下調為整數計算。
5. 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。
6. 營業同事遞交保單申請予AIA，應預留充足時間確保有關申請已於截數前由AIA及/或已授權之單位收妥。
7. 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，不得因獎賞而對客戶作特定銷售建議。
8. 競賽結果以保單冷靜期後作調整為準。AIA保留就調整後之競賽結果及就任何違規銷售行為追討已發放獎賞之權利。
9. 所有獎賞不可退換或轉換成以現金發放，安排均以AIA 最終安排為準。
10. 所有獲獎者必須於獎賞發放時仍與AIA持有效合約。
11. AIA保留隨時修改競賽規則或獎賞之權利，恕不另行通知。
12. 如有任何異議，以AIA最後決定為準。

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2026 Protection+1 Ranking Challenge for Financial Planner Limited-time Offer

Eligibility
All financial planners and agency leaders

Contest Period
September to October 2026 (2 months)

Contest Rules & Awards
All eligible policies under **"2026 Financial Planner Limited-time Offer"** within contest period will be ranked based on case count or Annualised New Premiums (ANP); qualifiers who achieved the below ranking will receive recognition at Annual Awards Presentation (AAP).

Category		Production by	Requirement: rank based on eligible policies under "2026 Financial Planner Limited-time Offer"	Rank	Award
(1)	Premier Grand Districts of the Year (PGDOY)	District Production	Case Count of eligible policies	Top 1	Receive recognition at Annual Awards Presentation (AAP)
(2)	Super Grand Districts of the Year (SGDOY)			Top 1	
(3)	Grand Districts of the Year (GDOY)			Top 1	
(4)	Districts of the Year (DOY)			Top 1	
(5)	Agency Leader	Direct Agency Production		Top 3	
(6)	Financial Planner	Personal Production	Annualised New Premiums (ANP) of eligible policies	Top 3	

Remarks

1. "2026 Financial Planner Limited-time Offer" includes the following products; please refer to Memo A260949 for details.

GlobalFlexi Savings Insurance Plan	Wealth Flexi Savings Insurance Plan
Wealth Elite 3	ProsperLife Insurance Plan
AIA Voluntary Health Insurance Privilege Ultra Scheme	AIA Voluntary Health Insurance SelectWise Scheme
Privilege Ultra Medical Plan (PU)	SelectWise Medical Plan (SW)
On Your Side Insurance Plan 2 Series (18-year or 25-year premium payment term)	

2. Only basic plans would be counted in case count; rider cases are excluded.
3. In case of ties with the same cases count under the same category, the ranking will be determined by ANP of eligible policies.
4. Qualifiers need to meet the minimum requirement of contract maintenance; please refer to Contract Maintenance stated in the "Compensation & Benefits Manual".
5. District eligibility and category is in accordance to 2026 Annual Awards - only District Directors appointed on or before 1 January 2026 and maintain a full year production base in preceding sales year are eligible, excluding districts newly joined in the current sales year. For 2026 Annual Awards District category (DOY category), please refer to the relevant email sent in June 2026.
6. Appeal is not entertained in this contest.

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General Rules & Regulations:

1. For New Policies with a single premium payment mode, Annualised New Premium ("ANP") shall be calculated as 10% of the single premium amount. If the policy is eligible for a premium discount under the 2026 Financial Planner Limited-time Offer, ANP shall be calculated based on the discounted premium amount in accordance with the following formula: ANP = Single Premium Amount × (100% − Applicable Premium Discount %) × 10%. For New Policies with a regular premium payment mode, ANP shall be calculated based on the standard premium payable under the policy and shall not be adjusted for any applicable premium refund.
2. Producers who have submitted policies/policies issued before the contest period but withdraw the captioned policy applications/cancel the captioned issued policies during the contest period and then reapply for the same products for the same insured, the corresponding case/FYC will not be counted.
3. Cases changed/lapsed from existing policies of the same insured will not be counted.
4. Cases will be counted according to total no. of cases rounding down into an integer after contest completion.
5. Policies under the same insured for the same basic plans and with same premium pay period, which are issued within the contest period will be counted as one case.
6. For case applications submitted to AIA, producers are reminded to allow sufficient time to ensure the applications are received by AIA and/or its authorized vendor before the cut-off time.
7. Sales representative should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
8. The result of the challenge shall be adjusted according to the execution of cooling-off rights by policyowners of the policies. AIA will reserve the right to retract the award based on the result and any substantiated violations of required sales conduct.
9. All privileges are not refundable, transferrable nor payable, program is subject to AIA's final decision.
10. Qualifiers must be inforce with AIA at the time the awards are paid out/ redeemed.
11. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability at any time without prior notice.
12. In the event of dispute, AIA's decision is final and conclusive.

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