AIA Hong Kong

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Memo

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

From: Angela Yeung

Copy: Ms. Melissa Wong/
All Department Heads /
Macau CEO/ ABDD Executives

Dept.: Customer & Marketing

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全心為客 堅守使命 BEYOND NUMBER ONE

Subject: A261014

AIA+ 功能升級、活動及內容更新速遞 (九月通訊)

AIA+ Updates | Features, Campaigns & Content Highlights (September's Edition)

為持續提升客戶數碼體驗及支援代理拓展業務，AIA+ 不斷優化平台功能、豐富內容生態及推出多元推廣活動，助您深化客戶互動，提升服務效率，並創造更多業務發展機會。

一、AIA+ 功能升級與優化

1.1 提升退休投資管理體驗 新增「未實現盈虧」顯示功能

為進一步提升數碼退休投資管理體驗，AIA+ 新增「未實現盈虧」顯示功能，讓客戶可直接於 AIA+ 查閱投資表現，更全面掌握退休投資組合及資產價值變動。此項優化有助客戶更清晰了解投資表現及組合變化，提高投資透明度。

- 直接於 AIA+ 查看未實現盈虧資訊。
- 提升退休投資表現的透明度及可視性。
- 一站式掌握退休儲蓄及投資進展。



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1.2 AIA+ 訊息中心分類優化 提升訊息管理體驗

為進一步優化客戶於 AIA+ 的服務體驗，AIA+ 優化了訊息中心的訊息分類功能，透過更清晰及有系統的分類方式，協助客戶更快捷地查閱及管理相關訊息。此項優化有助提升訊息搜尋效率，讓客戶能更輕鬆掌握重要通知及服務資訊。

- 優化訊息中心分類架構
- 更快捷查閱相關通知及資訊
- 提升訊息管理及瀏覽體驗



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1.3 全新自主樂齡健康服務登陸 AIA+ 助您活出健康自主人生

為支援客戶及其家人積極管理健康，AIA+ 現推出全新**「自主樂齡健康服務」**，透過預防保健、健康評估及持續健康支援，全方位照顧認知能力、視力健康及活動能力需要，助客戶享受更健康、更安心的生活。合資格客戶可透過 AIA+ 輕鬆啟動服務，並無縫連接指定健康服務及專業支援，開展健康自主生活之旅。

- 全新自主樂齡健康服務專區登陸 AIA+
- 涵蓋認知能力、視力健康及活動能力支援
- 提供健康評估、生活指導及持續跟進服務
- 一站式連接合作夥伴服務平台，享用各項線上線下健康支援服務
- 自動驗證合資格客戶身份，體驗更便捷



以上功能優化旨在提升客戶體驗，同時支援更高效的數碼服務運作。歡迎大家了解並善用新功能，於合適情況下向客戶分享。

我們正持續優化及提升 AIA+，以提供更流暢、更貼心的客戶體驗。於未來數月，我們計劃推出進一步的功能升級，為客戶帶來更豐富及更具互動性的數碼體驗。待相關功能進一步落實後，我們將適時與大家分享更多詳情。

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二、AIA+ 活動及積分獎賞

2.1團體客戶完成3項指定任務 最高可獲1,500 AIA友Points

為鼓勵客戶善用 AIA+ 團體保險服務及保持最新個人資料，新舊團體保險客戶只需於 AIA+ 完成指定任務，即可賺取 AIA友Points 獎賞。透過連結團體保險保單、開啟 AIA 福利資訊及優惠通知，以及更新聯絡資料，客戶可享受更個人化的會員體驗、接收最新福利資訊，同時提升 AIA+ 服務使用體驗。

指定任務及獎賞：

- **連結團體保險保單，獲得 500 AIA友Points**
- **開啟 AIA 福利資訊及優惠通知，獲得 500 AIA友Points**
- **更新電郵地址或手機號碼，獲得 500 AIA友Points**



請鼓勵客戶積極參與以上精彩活動及任務，透過 AIA+ 互動賺取積分及享受專屬禮遇，同時深化客戶參與度，提升 AIA+ 使用體驗，進一步加強與客戶的聯繫。

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請參閱以下指南，立即展開您的AIA友Point旅程。

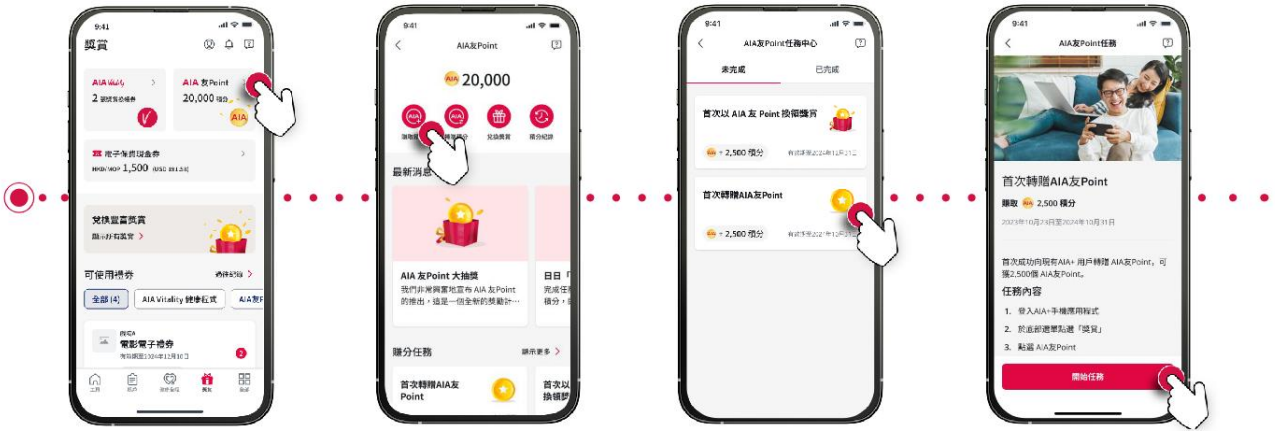
/賺取AIA友 Point

01/ 在「獎賞」頁面，點選「AIA 友 Point」

02/ 點按「賺取積分」

03/ 選取「首次轉贈AIA友Point」

04/ 點按「開始任務」



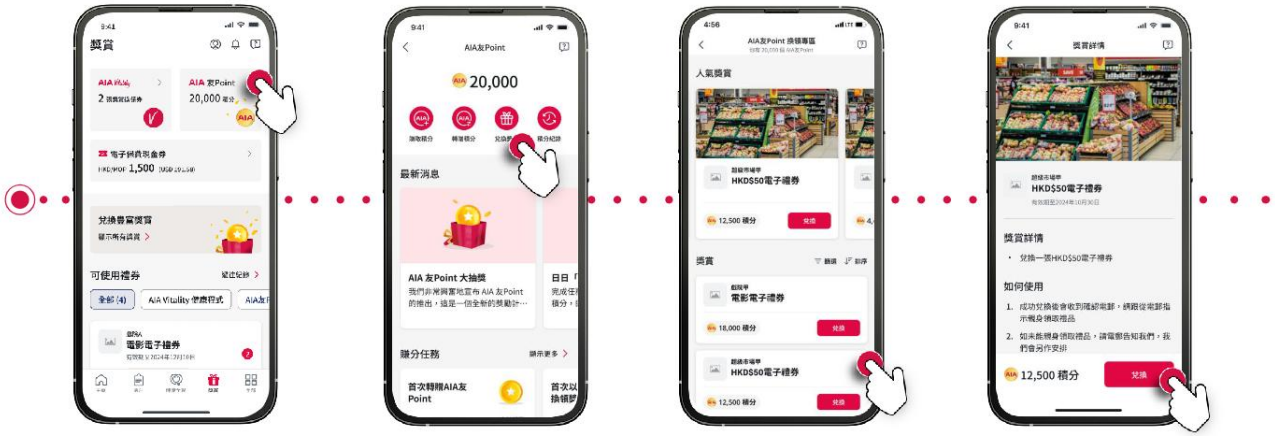
/兌換或使用AIA友 Point的獎賞

01/ 在「獎賞」頁面，點選「AIA 友 Point」

02/ 點按「兌換獎賞」

03/ 選取你想兌換的獎賞

04/ 點按「兌換」



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三、AIA+ 最新精選內容及資訊

AIA+ 持續豐富內容，為代理創造更多客戶互動及銷售切入點。透過主動分享相關內容，可提升客戶接觸頻率、深化客戶關係，並促進保障及財富管理需求發掘。

本月最新內容:



3.1 可攜式「友愛護」癌症保障計劃
3.2 可攜式「友心意」醫療保障計劃2
3.3 AIA - 最大的泛亞地區獨立上市人壽保險
3.4 AIA 錄得 110 億美元自由
3.5 醫保索償急升反映醫療需求增加——你為未來準備好未？
3.6 AIA+最新動態
3.7 及早規劃　應對醫療通脹
3.8 【限時雙重優惠】
3.9 友邦保險集團紮根亞洲逾100 年
3.10 財富盈活儲蓄保險計劃
3.11 「財富恆裕」人壽保險計劃3

AIA+ 將持續提升平台能力及數碼體驗，支持代理深化客戶關係、提升互動成效，並推動業務增長。我們期待與代理攜手善用 AIA+ 生態，共同創造更卓越的客戶體驗及業務成果。

如有任何查詢，歡迎電郵至 aiaplusinternal@aia.com。感謝您一直對 AIA+ 的支持。

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To continuously enhance the digital customer experience and empower agents to grow their business, AIA+ continues to strengthen its platform capabilities, enrich its content ecosystem, and launch targeted campaigns, helping agents deepen customer engagement, enhance service effectiveness, and unlock new business opportunities.

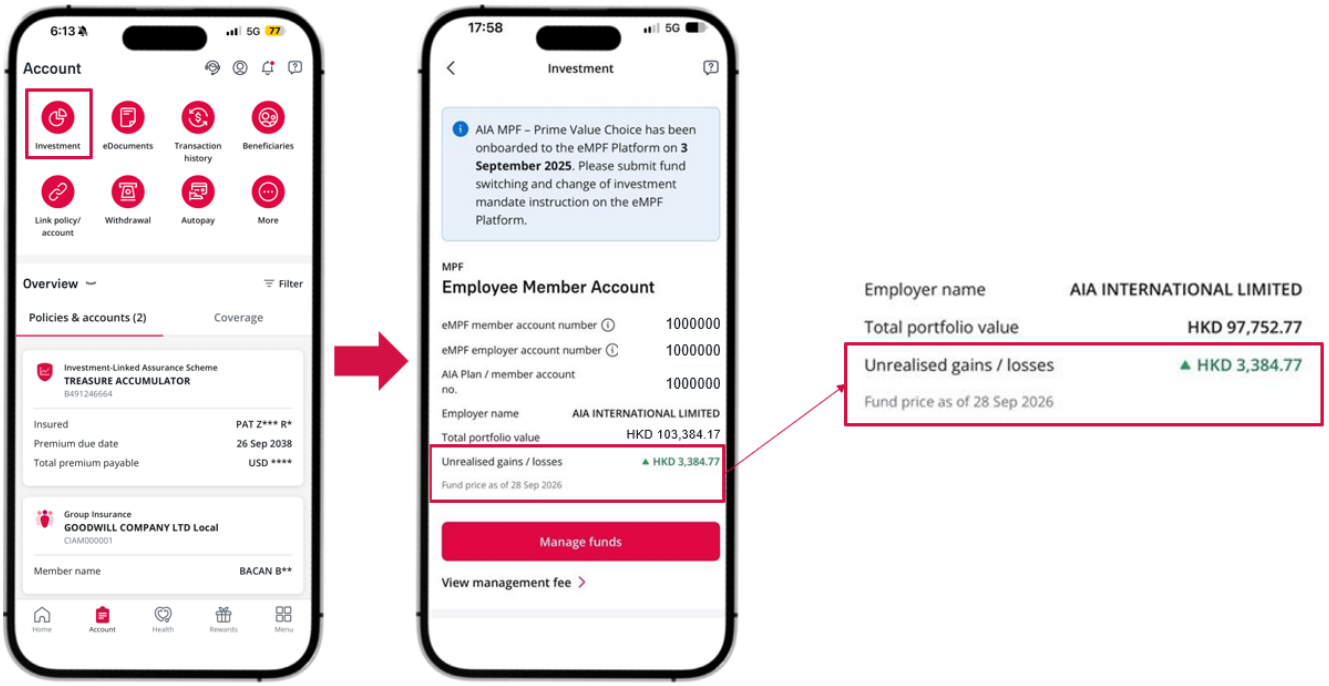
1. AIA+ Feature Enhancements and Improvements

1.1 Enhanced Retirement Investment Experience with Unrealized Gain/Loss Visibility

To further enhance the digital retirement management experience, AIA+ now enables customers to view unrealized gains/losses directly within their retirement investment account. Customers can conveniently monitor their investment performance in AIA+, providing greater visibility into portfolio performance and retirement savings progress.

This enhancement helps customers better understand their investment performance and stay informed of portfolio movements.

- View unrealized gains/losses directly within AIA+.
- Gain greater visibility into retirement investment performance.
- Better monitor retirement savings and portfolio progress in one place.



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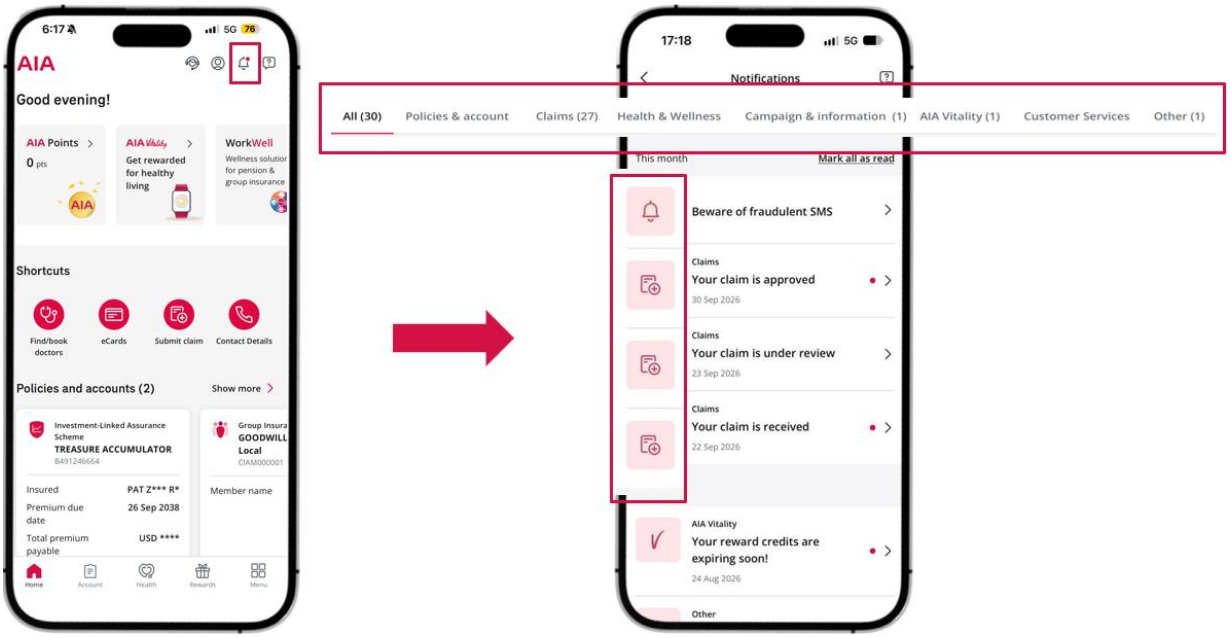
1.2 Enhanced AIA+ Notification Inbox with Optimized Message Categories

To uplift the customer experience on AIA+, the Notification Inbox will be upgraded with optimized message categorization. With a clearer and more structured categorization framework, customers can more easily locate and manage relevant messages.

This enhancement improves message accessibility and helps customers stay informed of important notifications and service updates.

- Optimized message categorization structure
- Easier access to relevant notifications and information
- Enhanced message management and browsing experience



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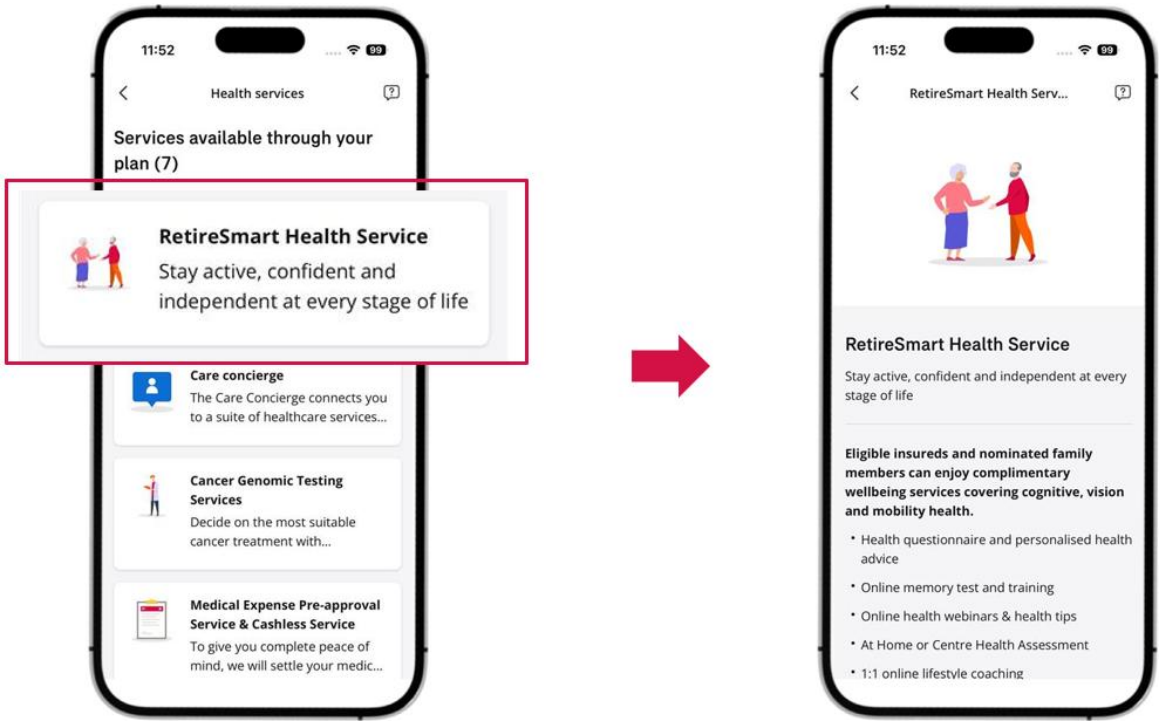
1.3 New RetireSmart Health Service Now Available on AIA+

To support customers and their family members in proactively managing their wellbeing, AIA+ now introduces the **RetireSmart Health Service**, providing comprehensive support across cognitive wellness, vision health and mobility wellbeing through preventive care, health assessments and ongoing health support.

Eligible customers can conveniently activate the service through AIA+ and enjoy seamless access to health professionals and partner services, empowering them to maintain a healthy and independent lifestyle.

- New RetireSmart Health Service available on AIA+
- Support across cognitive, vision and mobility wellness
- Health assessments, lifestyle guidance and ongoing care support
- Seamless connection to partner service providers, offering a wide range of online and offline health support services
- Automated eligibility verification for a smooth customer experience



These enhancements aim to improve overall customer experience while supporting more efficient digital service. We encourage you to familiarize yourself with the new features and share them with relevant customers where applicable.

We will continue to enhance AIA+ to deliver a more seamless and intuitive customer experience. More details will be shared once these enhancements are finalised.

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2. AIA+ Campaigns and Rewards

2.1 CS Members Earn Up to 1,500 AIA Points by Completing 3 Designated Tasks

To encourage customers to make full use of AIA+ Group Insurance services and keep their personal information up to date, both new and existing Group Insurance customers can earn AIA Points by completing designated tasks in AIA+. By linking their Group Insurance policy, enabling AIA benefits and promotional notifications, and updating their contact information, customers can enjoy a more personalized membership experience, stay informed of the latest offers and benefits, and enhance their overall AIA+ experience.

- Link a Group Insurance policy to earn 500 AIA Points
- Enable AIA benefits and promotional notifications to earn 500 AIA Points
- Update an email address or mobile number to earn 500 AIA Points



We encourage you to actively promote the above campaigns and missions to your customers. By participating through AIA+, customers can earn points, enjoy exclusive privileges, and engage with a variety of rewarding experiences. These initiatives help enhance customer engagement, enrich the AIA+ experience, and further strengthen long-term customer relationships.

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Please refer to the guide below to kick-start your AIA Points journey.

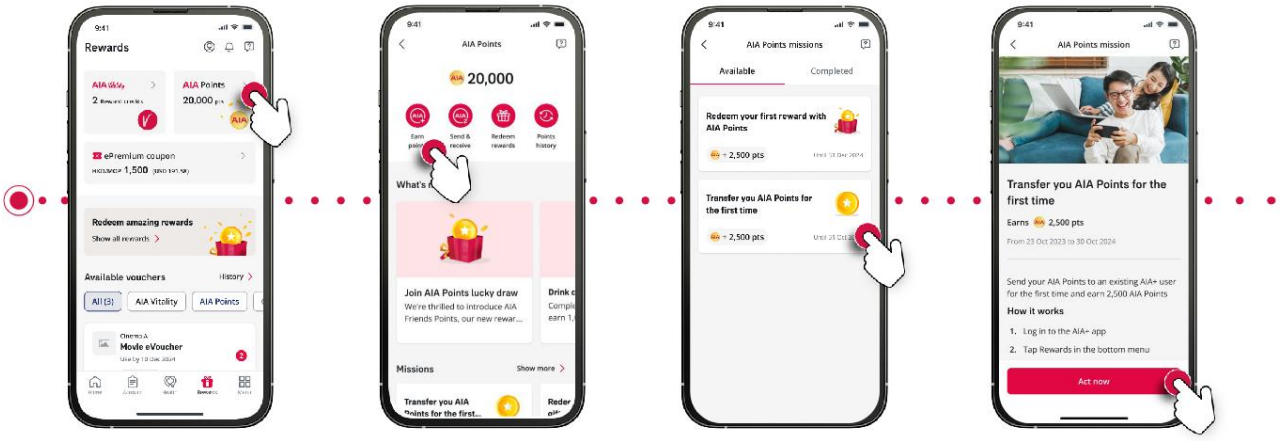
Earn AIA Points

01 On the "Rewards" page, click "AIA Points"

02 Click "Earn points"

03 Select "Transfer your AIA Points for the first time"

04 Tap "Act now"



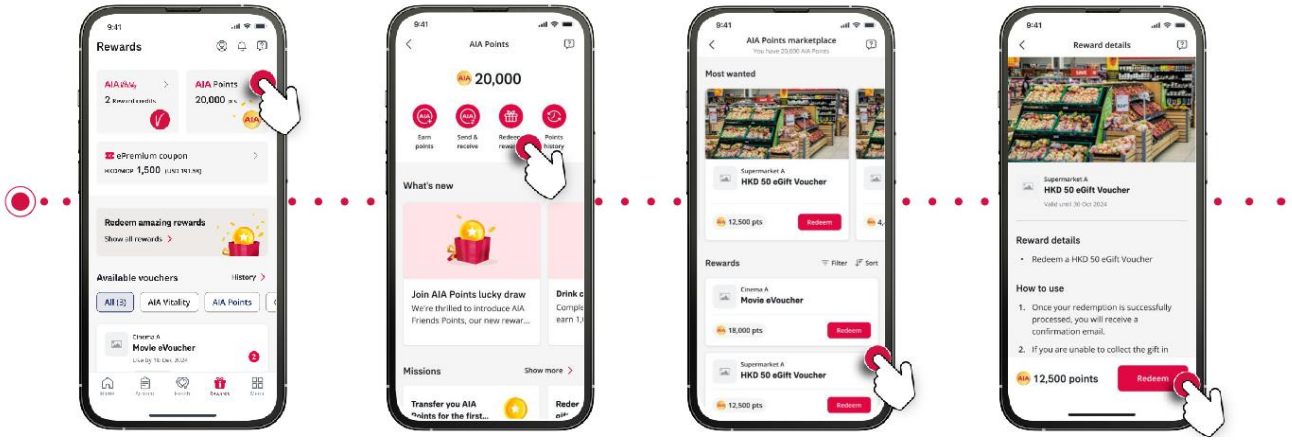
Redeem or use AIA Points

01 On the "Rewards" page, click "AIA Points"

02 Click "Redeem rewards"

03 Choose the reward that you would like to redeem

04 Tap "Redeem"



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3. Latest AIA+ Content Highlights

AIA+ continues to expand its content ecosystem, empowering agents with more opportunities to engage customers and initiate meaningful sales conversations. Proactive content sharing helps increase customer touchpoints, deepen customer relationships, and drive the discovery of protection and wealth management opportunities.



Featured content includes:

3.1 Portable Shield Up Cancer Protection Plan
3.2 Portable StepUp Medical Protection Plan 2
3.3 AIA: The Largest Independent Publicly Listed Pan-Asian Life Insurance Group
3.4 AIA recorded US$11 billion free surplus
3.5 Medical claims are on the rise — are you ready for what's ahead?
3.6 AIA+ Latest Highlight
3.7 Plan ahead for medical inflation
3.8 【Limited-time offer】 [Activation]
3.9 AIA has been rooted in Asia for over 100 years
3.10 Wealth Flexi Savings Insurance Plan
3.11 Wealth Elite Life Insurance Plan 3

AIA+ will continue to strengthen its platform capabilities and digital experience, enabling agents to deepen customer relationships, enhance engagement, and drive business growth. We look forward to partnering with our agency force to fully leverage the AIA+ ecosystem and deliver stronger customer and business outcomes together.

For enquiries, please contact us at aiaplusinternal@aia.com. Thank you for your continued support of AIA+.

Best regards,

Angela Yeung
Head of Customer Value Growth and Digital & Design Experience
Customer & Marketing

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