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: Mr. Leo Cheung

Dept: Life & Wealth Management Proposition Department

Copy: All Department Heads
Macau CEO / ABDD Executives

Total page: 17 pages + Appendix

Date: 12 October 2026

Subject: A261046 - 2026 **年第四季「投連友您」競賽**
2026 Q4 **"LET'S LINKED TOGETHER" Contest**

踏入第 4 季最後衝刺的黃金時刻，我們將繼續全力支持各位財務策劃顧問，在投資相連壽險業務上再創佳績。為此，特別推出 2026 年第 4 季「投連友您」競賽！

公司精心打造 AIA「投連鴻運金羊」24K 999.9 純金紀念幣作為競賽獎賞，寓意各位業績一路穩步上「羊」，並鼓勵大家全力拓展投連險業務。競賽詳情及更多投連險相關競賽資訊，請參閱下頁。

要成為卓越顧問，投資相連壽險業務絕對不容錯過！

	投連險相關競賽
競賽 1	「全方位羊揚得意」競賽 **(新推出)** (競賽期由2026年10月1日至2026年11月30日)
競賽 2	2026「投連友您。傑出精英」競賽暨 年度頒獎 (競賽期2026年1月1日至2026年12月31日)
競賽 3	「高淨值 x 投連險皇者歐洲會議」挑戰賽 (競賽期2026年7月1日至2027年12月31日)

(溫馨提示：財務策劃顧問需持有卷五牌照方可進行投資相連壽險保單之銷售活動；已考獲卷五之財務策劃顧問，必須先取得相關內部牌照才可銷售相關投資相連壽險計劃。於介紹任何投資相連壽險產品之前，財務策劃顧問必須跟客戶進行財務需要分析（FNA）及風險承擔能力問卷（RPQ），以確認客戶的投資需要、保費負擔能力及風險承擔能力。而在整個銷售過程中，財務策劃顧問不可向客戶提供任何投資建議，亦不可直接或間接向客戶提供任何禮物誘使客戶購買投資相連壽險保單。投資相連壽險保單只適合有人壽保障需要及投資需要的客戶購買。)

如有查詢，請電郵至 aiahkwealthmgnt@aia.com 與人壽與財富產品主張及策劃部聯絡。

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競賽 1:「全方位羊揚得意」競賽

競賽日期	2026年10月1日 至 2026年11月30日（包括首尾兩天）
競賽資格	所有財務策劃顧問及營業單位主管
合資格產品及保單	1. **投資相連業務 (ULB)：** • **遞交及繕發** 之投資相連壽險計劃保單。（所有「額外定期投資」之相關ANP* 將不獲計算。） 2. **全方位財富保障業務 (Total Wealth Protection Business):** • **遞交及繕發**之危疾、醫療、人壽、儲蓄及投資相連業務保單^ ^全方位財富保障業務產品詳見附表產品列表
競賽規則	**財務策劃顧問組別 (以個人業績計算)** 營業單位主管/財務策劃顧問 (以個人業績計算) 須同時達以下項要求:

要求 1: **於競賽期內** **投資相連壽險保單累積**ANP*	8,000 – 19,999 美元	**或**	20,000 美元 或以上

及

要求 2: **全方位財富保障業務顧問**	於 2026 年 1 月 1 日至 2026 年 11 月 30 日或之前成功遞交及繕發 1 張或以上 • 危疾產品保單^；及 • 醫療產品保單^；及 • 人壽產品保單^；及 • 儲蓄產品保單^；及 • 投資相連業務保單^

獎賞： **可獲 AIA「投連鴻運金羊」** 24K 999.9 **純金紀念幣**	一件 @	**或**	兩件 @
	每位達標之營業單位主管/財務策劃顧問 **最多可獲AIA「投連鴻運金羊」24K 999.9 純金紀念幣兩件** **(名額: 388件#)** @ 兩者不能同時兼得		

數量有限，先到先得，送完即止！

#如營業單位主管/財務策劃顧問達到競賽要求的日期相同，而數目超過尚餘之獎賞名額，將根據營業單位主管/財務策劃顧問於競賽日期內所有新投資相連壽險計劃保單的累積 ANP* 決定最終排名，以較高累積 ANP*為先。

請注意：若兩位或以上之營業單位主管/財務策劃顧問共同完成1張指定保單,
該保單之ANP*及保單數目將平均計算予各人。

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計算例子:

如營業單位主管/財務策劃顧問於競賽期內遞交及繕發之保單如下：

財務策劃顧問	全方位財富保障業務保單						累積投資相連業務保單 ANP*	可獲 AIA「投連鴻運金羊」純金紀念幣數目
	危疾產品保單	醫療產品保單	人壽產品保單	儲蓄產品保單	投資相連業務保單	全方位財富保障業務顧問		
A	1	1	1	1	1	是	8,000 美元	一件
B	1	1	1	2	2	是	20,000 美元	兩件
C	1	0	1	2	2	否	8,000 美元	不達標
D	1	1	1	0.5	4	否	10,000 美元	
E	2	1	1	1	3	是	6,000 美元	

AIA「投連鴻運金羊」24K 999.9 純金紀念幣 (設計圖片僅供參考)



**ANP(年化新保費)：指年化首年保費 100%及整付保費 10%之總和計算。*

於競賽期內，所有由同一財務策劃顧問就同一受保人繕發的相同基本計劃之新保單，將被視為 1 個合資格保單。

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競賽 2: 2026「投連友您。傑出精英」競賽 暨 年度頒獎典禮

競賽日期	2026年1月1日 至 2026年12月31日 (共12個月) 以半年業績計算: 2026年1月1日至6月30日 ｜ 以全年業績計算: 2026年1月1日至12月31日
競賽資格	所有財務策劃顧問及營業單位主管
產品	於競賽日期內**遞交及繕發**之新投資相連壽險計劃保單 (包括所有於競賽日期內正接受新生意的投資相連壽險產品， 但所有「額外定期投資」之相關ANP* 將不獲計算。)
競賽要求	**(A) 區域獎 (以區域業績計算)**

1) **「投連友您。傑出精英」區域業績大獎**

以區域所有投資相連壽險保單的累積繕發 ANP*計算

區域組別(1)	所有投連險保單 累積繕發 ANP*至少達	得獎排名 以半年業績計算 (2026 年 1 月 1 日至 6 月 30 日)	得獎排名 以全年業績計算 (2026 年 1 月 1 日至 12 月 31 日)
香港頂尖傑出區域(PGDOY)	$800,000 美元	首 3 位	首 3 位
香港超級傑出區域 (SGDOY)	$500,000 美元	首 5 位	首 5 位
香港傑出區域 (GDOY)	$250,000 美元	首 5 位	首 5 位
香港最佳區域 (DOY)	$150,000 美元	首 5 位	首 5 位
澳門區域 (MACAU)	$400,000 美元	首 3 位	首 3 位

2) **「投連友您。傑出精英」區域保單累積數目大獎**

以區域所有投資相連壽險保單的累積繕發保單數目**計算

區域組別(1)	所有投連險保單 累積數目^至少達	得獎排名 以半年業績計算 (2026 年 1 月 1 日至 6 月 30 日)	得獎排名 以全年業績計算 (2026 年 1 月 1 日至 12 月 31 日)
香港頂尖傑出區域(PGDOY)	70	首 3 位	首 3 位
香港超級傑出區域 (SGDOY)	50	首 5 位	首 5 位
香港傑出區域 (GDOY)	30	首 5 位	首 5 位
香港最佳區域 (DOY)	30	首 5 位	首 5 位
澳門區域 (MACAU)	30	首 3 位	首 3 位

3) **「投連友您。傑出精英」區域投連友您大獎**

以區域累積銷售投連險財務策劃顧問數目***計算

區域組別(1)	所有銷售投連險財務策劃顧問累積數目^至少達	得獎排名 以半年業績計算 (2026 年 1 月 1 日至 6 月 30 日)	得獎排名 以全年業績計算 (2026 年 1 月 1 日至 12 月 31 日)
香港頂尖傑出區域(PGDOY)	60	首 3 位	首 3 位
香港超級傑出區域 (SGDOY)	40	首 5 位	首 5 位
香港傑出區域 (GDOY)	20	首 5 位	首 5 位
香港最佳區域 (DOY)	10	首 5 位	首 5 位
澳門區域 (MACAU)	30	首 3 位	首 3 位

(1) 以上區域組別以截至 2026 年 1 月 1 日為準。

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4) **新 CIES 區域表揚獎 (只限香港區域)**

以區域業績計算，成功遞交及繕發最多符合「新 CIES」資格#之
全新投資相連壽險計劃保單數目的首 3 個區域。
(包括卓達智悅2、AIA「兩全保」保障型投資相連壽險計劃（整付保費），
以及AIA「兩全保」保障型投資相連壽險計劃（定期保費）)

#在保單申請時需要提供投資推廣署發出的淨資產審查申請的確認函副本以及新 CIES 參考編號
(符合「新資本投資者入境計劃」資格的保單準則請參閱通告 A240555)

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** 若一個或以上區域之投資相連壽險保單的累積繕發保單數目相同，將以區域之所有投資相連壽險保單的累積繕發 ANP 決定名次。

***若一個或以上區域之投資相連壽險保單的累積銷售投連險財務策劃顧問數目相同，將以區域之所有投資相連壽險保單的累積繕發 ANP 決定名次。

(B) 財務策劃顧問獎 (以個人業績^計算)

1) **「投連友您。傑出精英」財務策劃顧問業績大獎**

以半年業績計算 (2026 年 1 月 1 日至 6 月 30 日)	以全年業績計算 (2026 年 1 月 1 日至 12 月 31 日)
以個人所有投資相連壽險保單累積繕發 ANP* 計算，排名首 10 位的香港財務策劃顧問，以及排名首 5 位的澳門財務策劃顧問	以個人所有投資相連壽險保單累積繕發 ANP* 計算，排名首 10 位的香港財務策劃顧問，以及排名首 5 位的澳門財務策劃顧問
所有投資相連壽險保單累積繕發 ANP*至少達$100,000 美元 及 累積數目^至少達 2 張	

2) **「投連友您。傑出精英」財務策劃顧問保單累積數目大獎****

以半年業績計算 (2026 年 1 月 1 日至 6 月 30 日)	以全年業績計算 (2026 年 1 月 1 日至 12 月 31 日)
以個人所有投資相連壽險保單累積繕發保單數目計算，排名首 10 位的香港財務策劃顧問，以及排名首 5 位的澳門財務策劃顧問	以個人所有投資相連壽險保單累積繕發保單 數目計算，排名首 10 位的香港財務策劃顧問，以及排名首 5 位的澳門財務策劃顧問
所有投資相連壽險保單累積繕發 ANP*至少達$20,000 美元 及 累積數目^至少達 3 張	

^請注意：若兩位或以上之營業單位主管/財務策劃顧問共同完成 1 張指定保單, 保單數目將平均計算予各人。計算競賽結果時，若保單數目總數為點數, 數目將下調為整數計算。

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**若一位或以上財務策劃顧問之投資相連壽險保單的累積繕發保單數目相同，將以財務策劃顧問之所有投資相連壽險保單的累積繕發 ANP 決定名次。

(C) 新晉財務策劃顧問獎 (以個人業績^計算)

(適用於所有由 2025 年 1 月 1 日至 2026 年 6 月 30 日期間成功通過投資相連長期保險牌照考試，並 登記投資相連長期保險牌照 之財務策劃顧問)

1) **「投連友您。傑出精英」新晉財務策劃顧問業績大獎**

以半年業績計算 (2026 年 1 月 1 日至 6 月 30 日)	以全年業績計算 (2026 年 1 月 1 日至 12 月 31 日)
以個人所有投資相連壽險保單累積繕發 ANP* 計算，排名首 5 位的新晉香港財務策劃顧問，以及排名首 3 位的新晉澳門財務策劃顧問	以個人所有投資相連壽險保單累積繕發 ANP* 計算，排名首 5 位的新晉香港財務策劃顧問，以及排名首 3 位的新晉澳門財務策劃顧問
所有投資相連壽險保單累積繕發 ANP*至少達$10,000 美元 及 累積數目^至少達 2 張	

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2) **「投連友您。傑出精英」新晉財務策劃顧問保單累積數目**大獎**

以半年業績計算 (2026 年 1 月 1 日至 6 月 30 日)	以全年業績計算 (2026 年 1 月 1 日至 12 月 31 日)
以個人所有投資相連壽險保單累積數目計算**，排名首 5 位的新晉香港財務策劃顧問，以及排名首 3 位的新晉澳門財務策劃顧問	以個人所有投資相連壽險保單累積數目計算**計算，排名首 5 位的新晉香港財務策劃顧問，以及排名首 3 位的新晉澳門財務策劃顧問
所有投資相連壽險保單累積繕發 ANP*至少達$10,000 美元 及 累積數目^至少達 2 張	

^請注意：若兩位或以上之營業單位主管/財務策劃顧問共同完成 1 張指定保單, 保單數目將平均計算予各人。計算競賽結果時，若保單數目總數為點數, 數目將下調為整數計算。

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**若一位或以上財務策劃顧問之投資相連壽險保單的累積繕發保單數目相同，將以財務策劃顧問之所有投資相連壽險保單的累積繕發 ANP 決定名次。

獎賞	得獎區域/財務策劃顧問將可獲得 專屬紀念獎盃/錦旗，並獲邀出席頒獎典禮獲得嘉許

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於競賽期內，所有由同一財務策劃顧問就同一受保人繕發的相同基本計劃之新保單，將被視為 1 個合資格保單。

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競賽3:「高淨值 x 投連險皇者歐洲會議」挑戰賽

競賽日期	2026年7月1日 至 2027年12月31日 (共18個月)
競賽資格	所有財務策劃顧問及營業單位主管
合資格產品及保單	於競賽日期內符合以下要求的保單才可獲得計算競賽業績: 1. **高淨值業務**: • **遞交及繕發** 每張ANP* 達10萬美元或以上之保單。 ○ 保單以外的其他基本計劃及／ 或附加契約之保費，及保費徵費均不會被納入於計算此獎賞之內 。 ○ 所有投資相連壽險計劃保單除外。 及 2. **投資相連業務**: • **遞交及繕發** 之投資相連壽險計劃保單。 ○ 所有「額外定期投資」之相關ANP* 將不獲計算。
競賽規則	**財務策劃顧問獎 (以個人業績計算)** 財務策劃顧問 (以個人業績計算) 須同時達以下項要求: • 高淨值業務保單數目累積至少 3 張或以上； 及 • 投資相連壽險保單數目累積至少 6 張或以上 方可獲得指定「高淨值業務百人榜排名分數」及「投連險業務百人榜排名分數」 (排名分數詳見下表) 請注意：若兩位或以上之營業單位主管/財務策劃顧問共同完成1張指定保單, 該保單之ANP*及保單數目將平均計算予各人。

排名	高淨值業務百人榜 對應排名分數	投連險業務百人榜 對應排名分數
排名第一位	100	100
排名第二位	99	99
排名第三位	98	98
:	:	:
排名第九十九位	2	2
排名第一百位	1	1
排名第一百位以外	0	0

以「高淨值業務百人榜排名分數」及「投連險業務百人榜排名分數」總和計算，
獲得最高分數的首 35 位財務策劃顧問#，
每位財務策劃顧問可獲
「高淨值 x 投連險皇者歐洲會議」^出席資格一個 (出席資格不得轉讓) 。

以總和分數計算，如出現相同名次，將根據財務策劃顧問的 所有高淨值業務保單 及 所有投資相連壽險保單的累積 ANP* 決定排名，以累積較高 ANP*者名次列前。

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<table>
<tr><td>計算例子</td><td>如營業單位主管/財務策劃顧問於競賽日期內遞交及繕發之高淨值業務保單及投資相連壽險保單如下：
<table>
<tr><th>財務策劃顧問</th><th>高淨值業務保單數目</th><th>投資相連壽險保單數目</th><th>高淨值業務百人榜排名</th><th>投連險業務百人榜排名</th><th>排名</th></tr>
<tr><td>A</td><td>3張</td><td>6張</td><td>✓</td><td>✓</td><td>✓</td></tr>
<tr><td>B</td><td>1張</td><td>7張</td><td>✗</td><td>✓</td><td>✗</td></tr>
<tr><td>C</td><td>4張</td><td>3張</td><td>✗</td><td>✗</td><td>✗</td></tr>
<tr><td>D</td><td>2.5張</td><td>5.5張</td><td>✗</td><td>✗</td><td>✗</td></tr>
<tr><td>E</td><td>1.5張</td><td>8張</td><td>✗</td><td>✓</td><td>✗</td></tr>
<tr><td>F</td><td>4張</td><td>2.5張</td><td>✓</td><td>✗</td><td>✗</td></tr>
</table></td></tr>
<tr><td>獎賞</td><td><u>高淨值 x 投連險皇者歐洲會議**</u>
^內容、地點及行程安排將於稍後另行公佈。
** 預計之出發日期將為 2028 上半年度，具體詳情將稍後公佈。得獎者必須於旅程期間仍與 AIA 持有效營業員合約，才能獲資格出席旅程及所有活動。</td></tr>
</table>

*ANP (年化新保費) : 指年化首年保費 100%及整付保費 10%之總和計算。
於競賽期內，所有由同一財務策劃顧問就同一受保人繕發的相同基本計劃之新保單，將被視為 1 個合資格保單。

<u>適用於上述所有競賽之一般規則:</u>

1. 財務策劃顧問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，不得因任何獎賞而對客戶作特定銷售建議。
2. 有關截數日之安排，以 AIA 最新的通告或最新的 iPoS 截數日安排為準。
3. 如財務策劃顧問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/ 附加契約的 ANP 及數目將不獲計算。
4. 新保單以外的其他基本計劃及 ／ 或附加契約之保費及保費徵費均不會被納入於計算此優惠之內。
5. 於競賽期內，所有由同一營業單位主管/財務策劃顧問就同一受保人繕發的相同基本計劃之新保單將被視為 1 個合資格保單以計算投資相連壽險保單累積數目。
6. 財務策劃顧問不論透過紙本或電子方式遞交保單申請予 AIA，均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. 所有保單必須在競賽期內遞交及繕發並於發放獎賞時仍然生效，保單才獲計算在內。
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. 所有得獎者必須於獎賞發放時仍與 AIA 持有效合約。
10. AIA 保留隨時修改競賽規則或獎賞之權利 (例如獎品有機會以現金發放)，恕不另行通知。
11. 獎品不能兑換現金、其他貨品或折扣，以及不得轉讓。
12. 對於有關提供獎品之供應商所提供的獎品及服務質素，AIA 恕不承擔任何責任。
13. 如有任何異議，以 AIA 最後決定為準。

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As we enter Q4, this golden window for a strong finish, we will continue to fully support all Financial Planners in achieving outstanding results in Unit-linked business. We are excited to launch the 2026 Q4 "LET'S LINKED TOGETHER" Contest.

As a special contest reward, the Company has thoughtfully created the AIA "Prosperity Golden Goat" 24K 999.9 Pure Gold Coin, symbolizing steady "goat-ing up" performance, and inspiring everyone to further expand their Unit-linked business. For more contest details, please refer to the next page.

Actively take part in developing of Unit-Linked Business will definitely help you to achieve Premier Advisor!

	ULB Contests
Contest 1	"All-Round Goat Triumph" Contest (Newly launched) (Contest period from 1 October 2026 until 30 November 2026)
Contest 2	2026 "Unit-Linked Outstanding Elite" contest with Annual Award Ceremony (Contest period from 1 January 2026 until 31 December 2026)
Contest 3	Challenge of "Europe Convention for Elite of HNW x ULB" (Contest period from 1 July 2026 until 31 December 2027)

(Reminder: Financial Planner shall obtain paper 5 license for any Unit-Linked Policies selling activities. Financial Planner who has obtained Paper 5 license must first obtain relevant internal licenses before selling relevant Unit-Linked Policies. Before any Unit-Linked Policies selling activities, Financial Planner needs to conduct Financial Needs Analysis (FNA) and Risk Profile Questionnaire (RPQ) with customers to assess customer needs and premium affordability. During the solicitation process, Financial Planner shall not provide any investment advise to customers, and shall not directly or indirectly offer any gifts to induce customers to purchase Unit-Linked Policies. Unit-Linked Policies are only suitable for customers who have life insurance and investment needs.)

For enquiries, please email to aiahkwealthmgnt@aia.com.

Best Regards,

Leo Cheung

Leo Cheung
Head of Life & Wealth Management Proposition

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Contest 1: "All-Round Goat Triumph" Contest

Contest Period	1 October 2026 to 30 November 2026 (Both days inclusive)
Eligibility	For all Financial Planners and agency leaders
Product	**1. Unit-Linked Business (ULB)：** • Submit and deliver the ULB policies. (ANP generating from "Additional Regular Investment" will not be counted in this contest.) **2. Total Wealth Protection Business:** • Submit and deliver the Critical Illness policies, Medical policies, Life policies, Saving policies and ULB policies ^ ^ Please refer to the appendix for the full list of products under the Total Wealth Protection Business Products
Eligibility & Rewards	**For Financial Planners (by Individual Production)** Financial Planners and agency leaders (by individual production) must meet all of the following requirements simultaneously:

Requirement 1: Accumulate total ANP* of all Unit-Linked policies within contest period	USD $8,000 – $19,999	OR	USD $ 20,000 or above

AND

Requirement 2: Total Wealth Protection Business Producer	Submit and deliver 1 or more of the following policy(ies) from 1 January 2026 to 30 November 2026: • Critical Illness policies^；AND • Medical policies^；AND • Life policies^；AND • Saving policies^；AND • ULB policies^

Reward: Entitlement of **"Prosperity Golden Goat" Pure Gold Coin**	1 pc @	OR	2 pcs @
	Each awarded Financial Planner / agency leader will be **entitled to maximum of 2 AIA "Prosperity Golden Goat" 24K** 999.9 Pure Gold Coin (Quota: 388 pcs#) @ The two rewards are mutually exclusive.		

Offer valid while stocks last! First come, First served! Don't miss it!!

#If Financial Planners and agency leaders reach the contest requirements on the same day and the number of qualifiers exceeds the remaining quota of rewards, the final ranking will be determined based on the accumulated ANP* of all new Unit-Linked policies issued by the Financial Planners and agency leaders during the contest period, with the higher accumulated ANP* ranked first.

Please note: ANP* and case count for joint cases will be shared and counted equally among the production agents.

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Illustration:

If Financial Planners / agency leaders submitted and delivered policies within contest period as below:

Financial Planner	Total Wealth Protection Business Policies						Accumulated Unit-Linked policies ANP*	AIA "Prosperity Golden Goat" 24K 999.9 Pure Gold Coin
	Critical Illness policies	Medical policies	Life policies	Saving policies	ULB policies	Total Wealth Protection Business Producer		
A	1	1	1	1	1	Yes	USD 8,000	1 pc
B	1	1	1	2	2	Yes	USD 20,000	2 pcs
C	1	0	1	2	2	No	USD 8,000	Not entitled
D	1	1	1	0.5	4	No	USD 10,000	
E	2	1	1	1	3	Yes	USD 6,000	

AIA "Prosperity Golden Goat" 24K 999.9 Pure Gold Coin

(Design images are for reference only and may be further modified)



**ANP (Annualised New Premium): count as the sum of 1st year annualised premium (100%) and single premium (10%).*
All new policies under same insured with same basic plan within the contest period by the same producer will be treated as one eligible case only.

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Contest 2: 2026 "Unit-Linked Outstanding Elite" contest with Annual Award Ceremony

Contest Period	1 January 2026 to 31 December 2026 (Total 12 months) By half year production: 1 January to 30 June 2026 | By full year production: 1 January to 31 December 2026
Eligibility	For all Financial Planners and Agency Leaders
Product	New Unit-Linked policies **submitted and delivered** within contest period (including all Unit-Linked products which are available for new business within contest period, but all relevant ANP* from additional "Regular Investments" will be excluded.)

Ranking and Minimum Requirements

(A) District Award (by District Production)

1) Unit-Linked Outstanding Elite - Top ANP District Award

Ranked by accumulated ANP* of all Unit-Linked policies based on district production.

District Category(1)	Minimum accumulated ANP* of Unit-Linked policies	Award Ranking	
		By half year production: 1 January to 30 June 2026	By full year production: 1 January to 31 December 2026
Hong Kong Premier Grand Districts of the Year (PGDOY)	US$800,000	Top 3	Top 3
Hong Kong Super Grand Districts of the Year (SGDOY)	US$500,000	Top 5	Top 5
Hong Kong Grand Districts of the Year (GDOY)	US$250,000	Top 5	Top 5
Hong Kong Districts of the Year (DOY)	US$150,000	Top 5	Top 5
Macau Districts (MACAU)	US$400,000	Top 3	Top 3

2) Unit-Linked Outstanding Elite - Top Case Count** District Award

Ranked by accumulated number of policies** of all Unit-Linked policies based on district production.

District Category(1)	Minimum accumulated number of policies	Award Ranking	
		By half year production: 1 January to 30 June 2026	By full year production: 1 January to 31 December 2026
Hong Kong Premier Grand Districts of the Year (PGDOY)	70	Top 3	Top 3
Hong Kong Super Grand Districts of the Year (SGDOY)	50	Top 5	Top 5
Hong Kong Grand Districts of the Year (GDOY)	30	Top 5	Top 5
Hong Kong Districts of the Year (DOY)	30	Top 5	Top 5
Macau Districts (MACAU)	30	Top 3	Top 3

3) Unit-Linked Outstanding Elite - Top ULB Producer District Award

Ranked by accumulated number of ULB producers*** based on district production.

District Category(1)	Minimum accumulated number of ULB producers	Award Ranking	
		By half year production: 1 January to 30 June 2026	By full year production: 1 January to 31 December 2026
Hong Kong Premier Grand Districts of the Year (PGDOY)	60	Top 3	Top 3
Hong Kong Super Grand Districts of the Year (SGDOY)	40	Top 5	Top 5
Hong Kong Grand Districts of the Year (GDOY)	20	Top 5	Top 5
Hong Kong Districts of the Year (DOY)	10	Top 5	Top 5
Macau Districts (MACAU)	30	Top 3	Top 3

(1) All of the above Districts' title are referenced as of 1 January 2026.

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4) New CIES District Recognition Award (Hong Kong Districts Only)

Based on district production, the top three districts that successfully submit and deliver the highest number of new Unit-Linked policies within Contest Period, which are eligible for the New CIES# during the contest period.
(including Treasure Master Plus 2, AIA 2-in-1 Protection Linked Plan (Single Premium) and AIA 2-in-1 Protection Linked Plan (Regular Premium))

Customer needs to provide a copy of the acknowledgement from Invest Hong Kong and the New CIES reference number during policy application
(For details of policy eligibility for the new CIES, please refer to agency memo A240555)

*ANP (Annualised New Premium): count as the sum of 1st year annualised premium (100%) and single premium (10%).

**If the accumulated number of policies of all Unit-Linked policies issued of one or more districts is the same, the ranking will be determined by the accumulated ANP of all Unit-Linked policies based on district production.

***If the accumulated number of ULB producers of all Unit-Linked policies issued of one or more districts is the same, the ranking will be determined by the accumulated ANP of all Unit-Linked policies based on district production.

(B) Financial Planners Award (by Individual Production^)

1) Unit-Linked Outstanding Elite - Top Financial Planner in ANP*

By half year production: 1 January to 30 June 2026	By full year production: 1 January to 31 December 2026
Top 10 Hong Kong Financial Planners and Top 5 Macau Financial Planners ranked by accumulated ANP* of all Unit-Linked policies based on individual production.	Top 10 Hong Kong Financial Planners and Top 5 Macau Financial Planners ranked by accumulated ANP* of all Unit-Linked policies based on individual production.
Accumulated at least ANP* US$100,000 of Unit-Linked policies and 2 Unit-Linked policies	

2) Unit-Linked Outstanding Elite - Top Financial Planner in Case Count**

By half year production: 1 January to 30 June 2026	By full year production: 1 January to 31 December 2026
Top 10 Hong Kong Financial Planners and Top 5 Macau Financial Planners ranked by accumulated number of policies** of all Unit-Linked policies based on individual production.	Top 10 Hong Kong Financial Planners and Top 5 Macau Financial Planners ranked by accumulated number of policies** of all Unit-Linked policies based on individual production.
Accumulated at least ANP* US$20,000 of Unit-Linked policies and 3 Unit-Linked policies	

^ Please note: Joint cases will be shared evenly among the co-producers. Cases will be counted according to total no. of cases produced rounding down into an integer in result calculation.

*ANP(Annualised New Premium): count as the sum of 1st year annualised premium (100%) and single premium (10%).

**If the accumulated number of policies of all Unit-Linked policies issued of one or more financial planners is the same, the ranking will be determined by the accumulated ANP of all Unit-Linked policies of the financial planner.

(C) New Financial Planners Award (by Individual production^)

(Applicable to Financial Planners who successfully pass investment-linked long term Insurance license examination; and complete investment-linked long term insurance licensing registration from 1 January 2025 to 30 June 2026)

1) Unit-Linked Outstanding Elite - Top New Financial Planner in ANP

By half year production: 1 January to 30 June 2026	By full year production: 1 January to 31 December 2026
Top 5 New Hong Kong Financial Planners and Top 3 New Macau Financial Planners ranked by accumulated ANP* of all Unit-Linked policies based on individual production.	Top 5 New Hong Kong Financial Planners and Top 3 New Macau Financial Planners ranked by accumulated ANP* of all Unit-Linked policies based on individual production.
Accumulated at least ANP* US$10,000 of Unit-Linked policies and 2 Unit-Linked policies	

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<table>
<tr>
<td></td>
<td>
2) <u>Unit-Linked Outstanding Elite - Top New Financial Planner in Case Count**</u>
<table>
<tr><th>By half year production:
1 January to 30 June 2026</th><th>By full year production:
1 January to 31 December 2026</th></tr>
<tr><td>Top 5 New Hong Kong Financial Planners and
Top 3 New Macau Financial Planners ranked by accumulated number of policies** of all Unit-Linked policies based on <u>individual production</u>.</td><td>Top 5 New Hong Kong Financial Planners and
Top 3 New Macau Financial Planners ranked by accumulated number of policies* of all Unit-Linked policies based on <u>individual production</u>.</td></tr>
<tr><td colspan="2">Accumulated at least ANP* US$10,000 of Unit-Linked policies and 2 Unit-Linked policies</td></tr>
</table>
^ Please note: Joint cases will be shared evenly among the co-producers. Cases will be counted according to total no. of cases produced rounding down into an integer in result calculation.
*ANP(Annualised New Premium): count as the sum of 1st year annualised premium (100%) and single premium (10%).
**If the accumulated number of policies of all Unit-Linked policies issued of one or more financial planners is the same, the ranking will be determined by the accumulated ANP of all Unit-Linked policies of the financial planner.
</td>
</tr>
<tr>
<td>Award</td>
<td>Qualified Districts/Financial Planners will receive
exclusive commemorative trophy/pennant and be invited to attend the award presentation ceremony to receive recognition</td>
</tr>
</table>

**ANP(Annualised New Premium): count as the sum of 1st year annualised premium (100%) and single premium (10%).*
All new policies under same insured with same basic plan within the contest period by the same producer will be treated as one eligible case only.

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Contest 3: **Challenge of "Europe Convention for Elite of HNW x ULB"**

Contest Period	1 July 2026 to 31 December 2027 (18 months)
Eligibility	For all Financial Planners and Agency Leaders
Eligible Products and Polices	Only policies that meet the following requirements during the Contest Period will be counted towards contest production: 1. High-Net-Worth Business (HNW): • Submit and deliver the policy with an ANP* of US$100,000 or above ○ Premiums from other basic plans and/or riders attached to the New Policy, as well as any premium levy, will not be included in the ANP calculation for contest purposes. ○ All ANP generated from ILAS policies are excluded to be counted under HNW Business category. **AND** 2. Unit-Linked Business (ULB): • Submit and deliver the ULB policy ○ ANP generating from "Additional Regular Investment" will not be counted in this contest.
Contest rules	**Financial Planners Award (by Individual Production)** Financial Planners (by individual production) must meet all of the following requirements simultaneously: • Accumulated at least 3 or above HNW policies; AND • Accumulated at least 6 or above ULB policies in order to qualify for the designated "Top 100 HNW Business Ranking Score" and "Top 100 Unit-Linked Business Ranking Score" (please refer to the table below for ranking score details). Please note: ANP* and case count for joint cases will be shared and counted equally among the production agents.

Ranking	Top 100 HNW Business Ranking Score	Top 100 Unit-Linked Business Ranking Score
Rank 1st	100	100
Rank 2nd	99	99
Rank 3rd	98	98
:	:	:
Rank 99th	2	2
Rank 100th	1	1
Rank after 100th	0	0

Top 35 Financial Planners# with the highest combined score,
calculated based on the sum of their "Top 100 HNW Business Ranking Score" and "Top 100 Unit-Linked Business Ranking Score",
will each be awarded one qualification to attend the **"Europe Convention for Elite of HNW x ULB"^** (Qualification cannot be transferred).

Based on the total score calculation, in the event of the same ranking, the ranking will be determined by the Financial Planner's accumulated ANP* of total HNW policies and total ULB policies, with the higher accumulated ANP* ranked higher.

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<table>
<tr>
<td>Calculation Example:</td>
<td>Assume that the HNW policies and ULB policies submitted and delivered by Agency Leader / Financial Planner during the contest period are as follows:
<table>
<tr><th>Financial Planners</th><th>HNW policy(ies)</th><th>ULB policy(ies)</th><th>Top 100 HNW Business Ranking Score</th><th>Top 100 Unit-Linked Business Ranking Score</th><th>Ranking</th></tr>
<tr><td>A</td><td>3 policies</td><td>6 policies</td><td>✓</td><td>✓</td><td>✓</td></tr>
<tr><td>B</td><td>1 policy</td><td>7 policies</td><td>✗</td><td>✗</td><td>✗</td></tr>
<tr><td>C</td><td>4 policies</td><td>3 policies</td><td>✗</td><td>✗</td><td>✗</td></tr>
<tr><td>D</td><td>2.5 policies</td><td>5.5 policies</td><td>✗</td><td>✗</td><td>✗</td></tr>
<tr><td>E</td><td>1.5 policies</td><td>8 policies</td><td>✗</td><td>✓</td><td>✗</td></tr>
<tr><td>F</td><td>4 policies</td><td>2.5 policies</td><td>✓</td><td>✗</td><td>✗</td></tr>
</table>
</td>
</tr>
<tr>
<td>Award</td>
<td><u>Europe Overseas Convention for Elite of HNW x ULB **</u>
^The highlight of the trip, destination and itinerary arrangement will be announced later.
** The departure is tentatively scheduled for the first half of 2028. Details will be announced in due course. Qualifiers must maintain a valid Career Representative Contract with AIA throughout the trip and all related activities.</td>
</tr>
</table>

*ANP (Annualised New Premium): count as the sum of 1st year annualised premium (100%) and single premium (10%). During the contest period, all new policies issued by the same Financial Planner for the same insured under the same basic plan will be regarded as one qualifying policy.

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General Rules and Regulations (Apply to all contests aforementioned):

1. Producers should make product recommendations based on customer needs and affordability, and should not make any incentive-driven recommendations to customers.
2. The arrangement of closing dates will be subject to the latest memos or iPoS closing dates announced by AIA.
3. 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 will not be counted.
4. Apart from the New Policy, the premiums of all other basic plan(s) and/or add-on plan(s) and levy will not be applied for the calculation of this offer.
5. All new policies under same insured with same basic plan within the contest period by the same producer will be treated as one eligible case only when calculating the cumulative number of policies.
6. For applications submitted to AIA via hardcopy or electronic application, 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. All policies will only be counted if they are submitted and delivered within the contest period and are still in force during prize awarding.
8. The result of the contest shall be adjusted according to the cooling-off period of the policy. AIA reserves the right to retract the prize awarded.
9. Qualifiers must be inforce in AIA at the time the awards are paid out / redeemed.
10. AIA reserves the right to amend any of the rules of this contest or offer alternative gifts subject to availability (for example, gifts may be distributed in cash-in-lieu) at any time without prior notice.
11. The prize cannot be exchanged for cash, other products or discount.
12. AIA accepts no liability for the quality of prize and services provided by the respective merchants.
13. In case of any dispute, the decision of AIA is final.

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Appendix - 合資格全方位財富保障業務產品列表
List of Eligible Total Wealth Protection Business Products

產品 Products	
Admire Life Insurance Plan 2	「裕滿人生」保險計劃2
AIA 2-IN-1 Protection Linked Plan	AIA「二合一」保障投連壽險計劃
AIA Assemble	自在自選危疾保
AIA Deferred Annuity Plan	AIA延期年金計劃
AIA Deferred Annuity Plan 2	AIA延期年金計劃2
AIA One Absolute	AIA 唯一摯保
AIA One Absolute Pearl	AIA唯一摯保明珠
AIA PromiseSaver	AIA「承諾您」儲蓄計劃
AIA Voluntary Health Insurance Flexi Scheme	AIA自願醫保靈活計劃
AIA Voluntary Health Insurance Privilege Plus Scheme	AIA自願醫保尊裕計劃
AIA Voluntary Health Insurance Privilege Ultra Scheme	AIA自願醫保尊耀計劃
AIA Voluntary Health Insurance SelectWise Scheme	AIA自願醫保睿選計劃
AIA Voluntary Health Insurance Standard Scheme	AIA自願醫保標準計劃
Bonus Power Plan 2 (EP)	「充裕未來」人壽保險計劃2（特級保障）
Bonus Power Vantage	「充裕未來•盈尚」
Cancer Care Essence	智護癌症保
Cancer Guardian 3	癌症全方位保障3系列
Cancer Guardian Pearl 3	癌症全方位明珠保障 3
CEO Medical Plan 5	至尊醫療計劃5
CEO Pearl Medical 5	至尊明珠醫療計畫5
Critical Illness Rider Pro	危疾附加契約
EasyGuard Care Essence	守康易危疾保
EasyGuard Term Life Plan	「守康易定期壽險計劃」
Enhanced Critical Illness Rider Pro	特選危疾附加契約
Essence – On Your Side Insurance Plan (EOYS)	「簡緻•愛伴航」保險計劃
EverBliss Annuity Insurance Plan	優悅年金保險計劃
Executive Care Pro 2	泰然安心保2
Expert Term Life Plan Series	尊誠定期壽險計劃系列
FlexiAchiever Savings Plan	活享儲蓄計劃
Forever Love Coupon Plan 5	愛無憂長享計劃5
Fortune Promise 2	「諾享」保障計劃2
GBA Health Connect Outpatient Plan	大灣醫薈通門診計劃
GlobalFlexi Savings Insurance Plan	環宇盈活儲蓄保險計劃
Global Power Multi-Currency Plan 3	盈御多元貨幣計劃3
Golden Years Income Plan	「年金寶」入息計劃
Guaranteed Issue Whole Life Plan	「有投必保」儲蓄壽險計劃
Health Journey Guardian	全程守護健康保系列

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Hospital and Surgical Rider	「永無憂」
Hospitalization Benefit	「樂無憂」住院惠益附加契約
Individual Medical Plan	「倍無憂」醫療保障計劃
Journey Protection Medical Plan	全程保醫療保障計劃
Lady Care Pro	「摯愛您」保障計劃
Level-Up Protect Cancer Plan	「進添」計劃 – 癌症保障系列
Level-Up Protect Pearl Cancer Plan	「進添明珠」計劃 – 癌症保障系列
Life Endowement Special AP	分期支取儲蓄終身壽險連額外保障計劃
Metro-Trio Medical and Critical Illness Protection Plan (MT)	「都市三保」醫療危疾保障計劃 (MT)
Metro-Trio Pearl Medical and Critical Illness Protection Plan	「都市三保」醫療危疾保障計劃
Multiple Care Pro 2	多重安心保2
On Your Side Insurance Plan 2	「愛伴航」保險計劃2
On Your Side Insurance Plan 2 – First Gift	「愛伴航 – 首護摯寶」保險計劃2
OptimaCEO Medical Plan	極臻•至尊醫療計劃
OptimaCEO Medical Plan – First Gift	極臻•至尊醫療計劃 – 首護摯寶
OptimaCEO Medical Supplementary Contract (OPCEOR)	極臻•至尊醫療附加契約 (OPCEOR)
OptimaCEO Pearl Medical Plan	極臻•至尊明珠醫療計劃
OptimaCEO Pearl Medical Plan – First Gift	極臻•至尊明珠醫療計劃 – 首護摯寶
OptimaCEO Pearl Medical Supplementary Contract (OPCEOR)	極臻•至尊明珠醫療附加契約 (OPCEOR)
Outpatient Basic (OPB)	加倍關心門診保障
Outpatient Rider	倍關心門診保障
Pretty Choice Rider Pro	「愛意」附加契約
Prime Care Pro 2	進泰安心保
Privilege Ultra Medical Plan	尊耀醫療計劃
Privilege Ultra Pearl Medical Plan	尊耀明珠醫療計劃
ProsperLife Insurance Plan	「活然人生」保險計劃
SelectWise Medical Plan	「睿選」醫療計劃
SelectWise Pearl Medical Plan	「睿選明珠」醫療計劃
Serene Life	「樂怡人生」保障計劃
Serene Life (Annual Dividends)	「樂怡人生」保障計劃 (週年紅利)
Severe Illness Medical Protection Rider	嚴重疾病醫療保障附加契約
Severe Illness Pearl Medical Protection Rider	嚴重疾病明珠醫療保障附加契約
Shield Up Cancer Protection Plan	「友愛護」癌症保障計劃
Simple Care Essence	簡護危疾保
Simple Care Essence Pearl	「簡護危疾明珠保」
Simply Love Encore 5	「簡愛•延續」保障計劃 5
Smart Elite Ultra	多重智倍保
Special Target Saver Plus	簡易特級高息保
Spring Income Plan	「活出精彩」入息計劃
StepUp Medical Protection Plan 2	「友心意」醫療保障計劃 2

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Super Good Health Medical Plan 2	特技「健康之寶」醫療保障計劃 2
Super HealthGuard Pro	「進升危疾保障計劃」
Treasure Advantage 2	卓智投資計劃 2
Treasure Master Plus	「卓達智悅」
Treasure Master Plus 2	「卓達智悅2」
U-Select	「您想」投資連繫壽險計劃
Wealth Elite 2 - Ruby	「財富恆裕 2 • 霞」壽險計劃
Wealth Elite 2 - Sapphire	「財富恆裕 2 • 蔚」壽險計劃
Wealth Elite Life Insurance Plan 3	「財富恆裕」人壽保險計劃 3
Wealth Enrich	「財富顯裕」
Wealth Flexi Savings Insurance Plan	財富盈活儲蓄保險計劃
Wealth Generation	「財富源源」壽險計劃
Wisdom Term Life Plan Series	摯誠定期壽險計劃系列

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