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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
		Dept:	Customer and Marketing
Copy:	Ms. Melissa Wong All Department Heads Macau CEO / ABDD Executives	**Total pages:**	7
Date:	27 October 2026		

Subject: **A261086 「啟護您」— 癌症藥物保障: 現有客戶助銷配套**
FutureShield Cancer Drug Plan: Existing Customer Sales Enablement

「啟護您」— 癌症藥物保障：
現有客戶助銷配套隆重推出

為配合全新「啟護您」一癌症藥物保障隆重推出，我們特別準備一系列針對現有客戶的助銷配套、客戶優惠及推廣，以及鼓勵財務策劃顧問積極拓展業務的競賽獎賞，並協助客戶建立更全面的癌症藥物保障。

4 大現有客戶助銷配套如下:

1. 特選現有客戶專享多重賞
2. 客戶推廣
3. 營業員競賽
4. 現有客戶助銷工具包

1.特選現有客戶專享多重賞



現行電子保費現金券已適用於「啟護您」- 癌症藥物保障！電子保費現金券的使用詳情，將維持不變。詳情請按此參閱通告 A261092。

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2.客戶推廣	 因應 3 大賣點，陸續推出相關客戶通訊及 iSay 文章 (詳見附錄)。
3.營業員競賽	 營業員競賽 (通告 A261098 及通告 A261093) 即將推出。敬請期待！
4.現有客戶助銷工具包	 點擊閱覽電子版(只供內部使用) 針對不同現有客戶群設計一系列助銷工具包，含以下要主要內容(詳見附錄) ○ 現有客戶銷售攻略 ○ 特選現有客戶限時優惠一覽 ○ 特選產品組合銷售案例

特選客戶名單將於稍後上載至 iEngage (CRM) 及 AIA Smart+。敬請留意!

其他注意事項：

1. 財務策劃顧問須提醒客戶人壽保險保單屬長期的保險合約，其設計及宗旨為保障人的壽命，通常涉及較長年期。客戶應根據自身的保障需要和保費負擔能力投保適合的保險產品。
2. 財務策劃顧問不應以推廣優惠作客戶投保之誘因，及影響客戶作出知情的投保決定。財務策劃顧問向客戶推介產品前須進行財務需要分析，以評估客戶的需要及承擔能力。客戶須根據自己的需要及承擔能力以決定保費。
3. 香港及澳門財務策劃顧問只能於所屬營業牌照境內進行受規管活動。所有銷售活動及投保申請必須在香港及澳門境內進行。
4. 財務策劃顧問必須遵守"為抵港抵澳內地人士銷售保險業務的營運指引"及與抵港抵澳內地人士相關的工作指引。
5. 於接觸保單持有人前，請您必須檢查保單持有人是否已選擇拒收訊息。如是，請勿在獲取客戶明確同意前進行直接促銷(包括促銷推廣活動的優惠) 。
6. 財務策劃顧問必須根據客戶實際需要而建議合適產品。如該產品及/或地區屬於須要完成財務需要分析，財務策劃顧問必須於進行產品推介或銷售前與客戶完成相關之財務需要分析。
7. 財務策劃顧問必須清楚理解產品特色，並在客戶查詢時提供正確之產品資訊，及與產品相關連的風險及主要不受保事項等。

立即行動，把握商機，助客戶及早建立癌症藥物保障，同時爭取佳績及贏取豐富獎賞！

如有任何疑問，請電郵至客戶及市場策劃 (Customer and Marketing) AIAHK.CustomerExperience-ECM@aia.com

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FutureShield Cancer Drug Plan:
Existing Customer Sales Enablement Now Available

To support the launch of FutureShield Cancer Drug Plan, we have specially prepared a series of sales enablement materials for existing customers, along with customer offers and promotions, as well as agency contests designed to encourage financial planners to seize business opportunities while helping customers establish more comprehensive cancer drug protection.

FOUR existing customer sales enablement materials are as follows:

1. Existing Customer Offers
2. Customer Promotions
3. Agency Contests
4. Existing Customer Sales Enablement Pack

1. Existing Customer Offers	 Existing ePremium Coupons are now applicable to FutureShield Cancer Drug Plan! The usage details of ePremium Coupons remain unchanged. For details, please click here to read the Agency Memo A261092.
2. Customer Promotions	 Based on the three key selling angles, related customer promotional emails (eDM) and iSay articles (see appendix for details) will be launched.
3. Agency Contests	 Agency contests (agency memo A261098 & A261093) will be launched. Stay tuned!

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4. Existing Customer Sales Enablement Pack	 Click for e-version - Chinese only (For internal use only) Sales enablement materials tailored to different existing customer segments have been developed (See appendix for details) • Existing Customer Sales Tips • Selected Existing Customer Offer-at-a-Glance • Selected Combo Offer Cases

Selected Customer Lists will be uploaded to iEngage (CRM) and AIA Smart+. Stay tuned!

Other Points to Note:

1. Financial planners should remind customers that life insurance policies are long-term contracts of insurance, designed and intended to be in force over multiple years of a person's life. Customers should apply suitable insurance products based on their own protection needs and affordability.
2. Financial planners should not use promotion offers as the incentive for attracting customers to apply for an insurance plan and should not be used to distract customers from making an informed decision on whether or not to purchase the product. Financial planners must conduct financial needs analysis to assess the customers' needs and affordability before making product recommendation. Customers should decide the premium based on their needs and affordability.
3. Customer campaign can only be promoted within Hong Kong and Macau territory according to the agent's relevant license. All solicitation activities and insurance application must be conducted in Hong Kong and Macau territory.
4. Please follow the "Operating Guidelines For Agents On Dealing Insurance Business With Applicants / Policyowner from MCV Business" and MCV related guidelines.
5. Before contacting the policyholder, please check whether the policyholder is on the opt-out list or not. If yes, please do not conduct direct marketing before obtaining explicit consent from customers (including the promotional activities).
6. Financial Planners must recommend product to customers based on the customer's actual need. If the product concerned and/or Territory requires the completion of Financial Needs Analysis, Financial Planners must complete such analysis with customers before product recommendation / solicitation.
7. Financial Planners must familiarize with the product features, and explain clearly the key product features, risks and exclusions to customers upon receipt of customers' enquiries.

Act now to seize the opportunity. Help your customers establish comprehensive cancer drug protection at an early stage, while achieving outstanding performance and earning attractive rewards.

Should you have any queries, please email to Customer and Marketing at AIAHK.CustomerExperience-ECM@aia.com

Best regards,

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

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附錄

現有客戶助銷工具包

針對不同現有客戶群設計一系列助銷工具包，結合客戶需求分析、最新市場洞察、產品核心優勢及限時優惠，助大家更有效與客戶開展對話，協助他們建立更全面的癌症藥物保障。

1. 現有客戶銷售攻略 (只供內部使用)

樂齡長者 (銀髮族)



職場新世代 (年輕一族)



新香港人



2. 特選現有客戶限時優惠一覽 (只供內部使用)

特選現有客戶專享多重賞



3. 特選產品組合銷售案例 (只供內部使用)

客戶群：銀髮族
產品：「啟護您」



客戶群：銀髮族
產品：「啟護您」+ 優悅年金保險計劃



客戶群：年輕一族
產品：「啟護您」+ 特級「健康之寶」醫療保障計劃 2



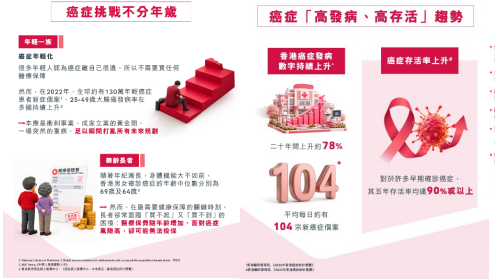
點擊閱覽電子版

iSay 友分享文章

有關「啟護您」－癌症藥物保障的 iSay 友分享文章已經推出，請即登入 AIA Smart+ 與客戶分享 iSay 文章，把握銷售機會。更多相關文章亦將陸續推出，敬請留意！

文章編號 ISAY – 816







Appendix

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Existing Customer Sales Enablement Pack

A series of sales enablement materials tailored to different existing customer segments have been developed, incorporating customer needs analysis, the latest market insights, key product propositions and limited-time customer offers. These materials are designed to help you engage customers more effectively, facilitate meaningful conversations, and support them in building more comprehensive protection against cancer drug treatment costs.

1. Existing Customer Sales Tips (for internal use only)

Silver segment



Young segment



New HongKonger segment



2. Selected Existing Customer Offer-at-a-Glance (for internal use only)

Selected existing customers can enjoy limited-time offers



3. Selected Combo Offer Cases (for internal use only)

Segment: Silver
Product：FutureShield



Segment：Silver
Product：FutureShield + EverBliss Annuity Insurance Plan



Segment：Young
Product：FutureShield + Super Good Health Medical Plan 2



Click for e-version - Chinese only

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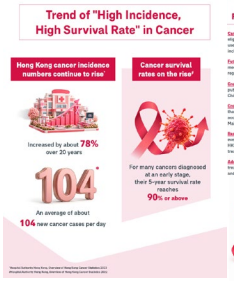
iSay Article	iSay article on FutureShield Cancer Drug Plan is now available. Log in to AIA Smart+ to share the iSay article with your customers and seize valuable sales opportunities. More related iSay articles will be released soon, so stay tuned! Article ID: ISAY–816









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