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

Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong and Macau)	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 / Contact Centre	Dept:	Corporate Solutions
Date:	2 November 2026	Total pages:	5
Subject:	(A261123) **團體保險「報價開單・雙重賞」** **Group Insurance Get Set Go**		

好消息！為鼓勵營業同事積極拓展團體保險業務，**企業業務誠意推出『團體保險「報價開單・雙重賞」』**。請即把握推廣期帶來的業務機遇，**積極爭取更多商機，贏取豐富現金獎賞！**詳情如下：

<table>
<tr><td>參加資格</td><td>所有香港及澳門營業同事</td></tr>
<tr><td>推廣期</td><td>2026 年 10 月 1 日 至 2027 年 1 月 31 日</td></tr>
<tr><td>獲獎資格及獎賞</td><td>於推廣期內，每成功索取合資格團體人壽 / 團體醫療保險度身訂造計劃報價書[1-4, 6-7]，而保單生效日期須為 2027 年 1 月 1 日至 1 月 31 日，並提供準客戶指定資料[8]，即可按個案之年度化保費[11]獲得現金獎賞；如成功完成全新團體保險度身訂造計劃，更可獲得額外現金獎賞，每份報價書最高可獲 HK$33,500 現金獎賞！
<table>
<tr><th>團體保險
個案類別</th><th>獲獎要求</th><th>年度化保費
HK$1,000,000 – HK$2,999,999[11]</th><th>年度化保費
HK$3,000,000 – HK$4,999,999[11]</th><th>年度化保費
HK$5,000,000 或以上[11]</th></tr>
<tr><td>現時由其他保險公司承保之準客戶[7]</td><td>遞交正式團體保險度身訂造計劃計劃報價書，並提供指定資料[8]</td><td>現金獎賞
HK$1,000</td><td>現金獎賞
HK$2,000</td><td>現金獎賞
HK$3,000</td></tr>
<tr><td>現時由其他保險公司承保之準客戶[7]</td><td>上述相關報價書於2026 年 12 月 1 日前遞交[8]</td><td>現金獎賞
HK$500</td><td>現金獎賞
HK$500</td><td>現金獎賞
HK$500</td></tr>
<tr><td>現時由其他保險公司承保之準客戶[7]
或
全新團體保險度身訂造計劃[1-4, 6]</td><td>成功完成全新團體保險度身訂造計劃[8]</td><td>現金獎賞
HK$10,000</td><td>現金獎賞
HK$20,000</td><td>現金獎賞
HK$30,000</td></tr>
<tr><td colspan="2">每宗團體保險度身訂造計劃
最高可獲之現金獎賞</td><td>現金獎賞
HK$11,500</td><td>現金獎賞
HK$22,500</td><td>現金獎賞
HK$33,500</td></tr>
</table>
</td></tr>
</table>

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。 "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

[AIA – INTERNAL]

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

一般規則及要求：

1. 團體保險包括度身訂造計劃（惟原有保單轉換、僱員自選產品、LAUGHING「自選牙科保障計劃」、澳門摯開心保障計劃及附加額外保障計劃除外）。
2. 要符合資格，每張團體保險保單必須於推廣期內：(a) 生效；(b) 提交完整投保申請文件至 AIA 企業業務；(c) 於 2027 年 2 月 28 日或之前成功繳付首年保費。
3. 團體保險 ANP 包括於推廣期內成功繳付的團體保險保單年度化新保費。
4. 如果申請屬共同個案（即個案由 2 名或以上營業同事共同完成），獎賞將按比例平均分配。如有關獎賞以 ANP 計算，每名營業同事獲計算之 ANP 將按比例平均分配。
5. 若營業同事於推廣期之前已遞交相關保單 / 相關保單已獲繕發，並於推廣期內撤回投保申請 / 取消相關保單，其後再次投保相同產品計劃，相關保單將不獲計算。
6. 僱員人數必須達 10 名或以上。
7. 獎賞只適用於現時由其他保險公司承保之準客戶。如準客戶於推廣期內同時索取團體人壽及團體醫療保險度身訂造計劃報價書，將當作 2 個計劃報價書計算。
8. (A) 保單週年日
   (B) 現有福利概要
   (C)《只適用於團體醫療保險》索償比率報告（本年度不少於 8 個月的索償紀錄）及受保僱員人數
   (D)《只適用於團體人壽保險》受保僱員資料（包括：年齡、性別及保額）
9. 此獎賞不適用於任何在保單週年日 / 生效日期之後才申請索取之報價書。
10. 由其他保險公司發出正式及完整報價書（必須附有相關保險公司的標誌），包括保費價錢、福利及條款。
11. 根據以下各項中的最高值：
    - 年度化已付賠償金額（由現有保險公司提供之官方賠償報告及相關文件作証明）
    - 友邦保險官方帳單所載之年度化新保費（適用於已結案之個案）
12. 所有由現有保單轉換 / 退保後由同一受保人或同一持有人持有之保單將不獲計算。
13. 所有獲獎者必須於發放獎項及嘉許時仍與 AIA 保持有效合約關係。獎項及嘉許不可轉讓。
14. 友邦保留隨時修改本活動規則之權利，恕不另行通知。
15. 如有任何爭議，友邦保留最終決定權。

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。

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。 “AIA” or “AIA Hong Kong” herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

[AIA – INTERNAL]

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

Good News! Corporate Solutions is pleased to introduce the **"Group Insurance Get Set Go"**, offering more rewarding opportunities for our agency force to grow their Group Insurance business. **Seize the opportunity, expand your business potential and earn attractive cash rewards!** Details are as follows:

<table>
<tr><td>Eligibility</td><td>All Hong Kong and Macau Financial Planners</td></tr>
<tr><td>Promotion Period</td><td>1 October 2026 – 31 January 2027</td></tr>
<tr><td>Qualifying Criteria and Rewards</td><td>During the Promotion Period, obtain an eligible quotation for a Group Life / Group Medical Insurance Tailor-made Plan[1-4, 6-7] with a policy effective date from 1 January to 31 January 2027 and provide the required prospect information[8] to earn a cash reward based on the annualized premium[11] of the case. Successfully complete a new Group Insurance Tailor-made Plan to earn an additional cash reward, with total cash rewards of up to HK$33,500 per quotation!
<table>
<tr><th>Group Insurance Case Type</th><th>Qualifying Criteria</th><th>Annualized Premium HK$1,000,000 – HK$2,999,999[11]</th><th>Annualized Premium HK$3,000,000 – HK$4,999,999[11]</th><th>Annualized Premium HK$5,000,000 or above[11]</th></tr>
<tr><td>Prospect currently insured by another insurer[7]</td><td>Submit a formal Group Insurance tailor-made plan quotation with the required information[8]</td><td>HK$1,000 Cash Reward</td><td>HK$2,000 Cash Reward</td><td>HK$3,000 Cash Reward</td></tr>
<tr><td>Prospect currently insured by another insurer[7]</td><td>Submit the relevant quotation before December 1, 2026[8]</td><td>HK$500 Cash Reward</td><td>HK$500 Cash Reward</td><td>HK$500 Cash Reward</td></tr>
<tr><td>Prospect currently insured by another insurer[7]
OR
Group Insurance new business case[1-4, 6]</td><td>Successfully converted into a new Group Insurance tailor-made plan[8]</td><td>HK$10,000 Cash Reward</td><td>HK$20,000 Cash Reward</td><td>HK$30,000 Cash Reward</td></tr>
<tr><td colspan="2">Maximum Cash Reward for each Group Insurance Tailor-made Plan</td><td>HK$11,500 Cash Reward</td><td>HK$22,500 Cash Reward</td><td>HK$33,500 Cash Reward</td></tr>
</table></td></tr>
</table>

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。 "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

[AIA – INTERNAL]

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

General Rules and Requirements:

1. Group Insurance Policies include tailor-made plans (excluding conversion from existing policies, employees' voluntary plans, LAUGHING, CHEERS Macau and top-up plans).
2. Each Group Insurance Policy is qualified if, a) the Policy is effective, b) the application documents of the Policy are completed and submitted to AIA Corporate Solutions and c) the first-year premium is successfully settled on or before Feb 28, 2027.
3. ANP for Group Insurance Case includes the Annualized New Premiums of Group Insurance Policies settled during the Promotion Period.
4. If the qualified cases are jointly closed by two or above producers, the reward will be shared in proportion. If the reward is calculated by ANP, the ANP allocated for each producer will be averagely shared in proportion.
5. Financial Planners who have submitted policies / policies issued before the Promotion Period and then reapply for the same products with the same insured, the corresponding policies will NOT be counted.
6. The number of employees must be 10 or above.
7. Reward is only applicable to the prospective customer currently insured at the other insurance company. If the prospective customer(s) requested for both Group Life and Group Medical tailor-made policy proposal during the Promotion Period, 2 proposals will be counted.
8. (A) Policy Anniversary Date
   (B) Existing Benefits Schedule
   (C) < Only applicable for Group Medical Insurance > Official Claim Report (Claim records of at least 8 months of this year) and number of insured employees
   (D) < Only applicable for Group Life Insurance >Insured employee' s details (including age, gender and sum assured)
9. Reward is not applicable to any proposal requested after the policy anniversary/effective date.
10. Official insurance proposal with completed information from other insurance company (with related insurance company logo), including price, benefits, and terms.
11. Based on the highest value among the following:
    - Annualized claim paid amount (Need to be supported by the official claim report and documentation provided by the current insurer)
    - Annualized New Premium derived from the AIA official invoice (Applicable for closed cases)
12. The relevant policy count of policy changed / lapsed from existing policies of the same policyholder or insured will NOT be counted.
13. Qualifiers must be in-force with AIA when the time when the rewards are offered. The award and recognition are not transferrable.
14. AIA reserves the right to amend the rules, terms and conditions of this promotion at any time without prior notice.
15. In case of any disputes, AIA reserves the right for any final decision.

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。 "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

[AIA – INTERNAL]

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

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

We wish you every success!

Yours faithfully,



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

「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。 "AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

[AIA – INTERNAL]