友邦代理人專業責任保險
電子申請及繳費平台使用指南

首次申請程序

連結到電子平台

所有新入職之財務策劃顧問獲 AIA 發出營業員編號後，其 AIA 營業單位主管將收到 AIA 發出之電郵通知，可透過附上之網上連結或二維條碼 QR Code 申請 友邦代理人專業責任保險 及繳付保費。

電子平台相容性

此平台只適用於以下電子產品/系統/軟件:
電子產品 : 智能手機 或 平板電腦
建議系統: iOS 或 Android
建議瀏覽器: Safari 或 Google Chrome

此平台只適用於以下信用卡:
Visa 或 Master

瀏覽 AIA Agents Protector 專業責任保險短片

網址: https://www.youtube.com/watch?v=AiCuUyBA-UE&feature=youtu.be

1

i. 選擇申請表所顯示之語言，但注意您在申請表上填寫的資料仍必須為**英文**。

ii. 選擇您在友邦之合約形式 - **財務策劃顧問 / 實習生**。

iii. 選擇您在友邦之合約生效日期。

例子:

	申請日期	AIA合約日期	保單起保日	保單到期日
現職之財務策劃顧問	2020年4月1日	1990年1月1日	2020年5月1日	2020年9月30日
新人職之財務策劃顧問	-	2020年4月1日	2020年4月1日	2020年9月30日

iv. 按「下一步」。



2 (如您申請此保險的日期在您與友邦的合約開始日期的三個月內，此頁並不適用)

i. 如果在以上這三個問題中的任何一個答案為“是”，您的申請將被暫停，請提供所需的資料以供 AIG 審核。
ii. 請聯絡 AIG 熱線 3666 7012 (星期一至五上午 9 時至下午 5 時 30 分)，並留下您的聯繫方式，包括以下資料：
    1.) 香港身份證上的英名全名
    2.) 營業員編號 (Agent code)
    3.) 聯絡電話
    4.) 電郵地址
iii. 我們核保部同事將於兩個工作日內與您聯繫，並會告知您所需要提交的補充資料。
iv. 請您透過指定郵箱向我們提交補充資料。
v. 成功審核後，我們將透過電子郵件提供有效通行碼以供您繼續進行申請。



3

i. 輸入您的英文名字 (身份證上的名字)，**姓氏先行**。

ii. 輸入您的**友邦營業員編號** (Agent Code)。

iii. 輸入您的**營業單位編號** (Agent Code) (如沒有有關資料，請向您的營業單位的秘書或經理了解)。

iv. 輸入您的**營業單位名稱** (Agency Name) (如沒有有關資料，請向您的營業單位的秘書或經理了解)。

v. 輸入您的**內部郵遞編號** (Area Code) (如沒有有關資料，請向您的營業單位的秘書或經理了解)。



vi. 請提供您的**公司電郵** (@aia.com.hk/aia.com.mo) **及/ 或 個人電郵**。 請確保它為您常用之電郵，因為美亞保險是以此發送保險憑證和繳交保費通知的預設途徑。

vii. 請提供您的**手提電話號碼**。這是當美亞保險不能經電郵與您連繫時的後備聯絡方法。

viii. 系統會自動產生起保日期。如您的申請日期在您合約開始日期的三個月之內，起保日期就會是等同於合約生效日期。若您的申請日期在您合約開始後超過三個月，起保日期就會是下個月的第一日，例如，您的合約日期為一月一日，如果您在四月份申請，您的起保日期就是五月一日。

ix. 填寫**住址**。

x. 按「下一步」。



4

i. 按下選項可檢視計劃保障內容之總結。之後，您可以於合適之計劃選項下按「立即投保」進入繳費程序。



5

i. 核對已輸入資料，如需作任何修改，請按「修改」。
ii. 勾選「同意及確認」以確認閱覽並接受聲明及條款。
iii. 勾選「本人已閱讀及明白個人資料收集聲明，並同意接受其約束。」。
iv. 然後按「確認及付款」進入繳費程序。



預覽投保資料

參考編號	020055/00
合約日期	2020-04-01
生效日期	2020-04-01
到期日期	2020-09-30
保障計劃	財務策劃顧問
保費	HK$ 294.00 (包括保費徵費)

受保人資料

姓名(與身分證上相同) 備註: 請以英文填寫
營業員編號 (Agent Code)
營業單位編號 (Agency Code)
營業單位名稱 (Agency Name)
內部郵遞編號 (Area Code)
AIA公司電郵
手提電話號碼
地址
地區
區域

聲明

本人確認本人已細閱以上資料並確認以上資料均正確無誤。本人聲明：

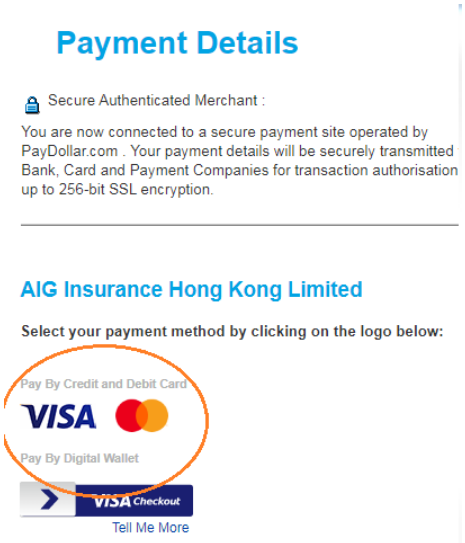
1. 就申請「友邦保險代理人專業責任保險」，現授權友邦保險 (國際) 有限公司 (下稱「友邦保險」) 及Life Underwriters & Sales Executive Board (HK) Limited (下稱「LUSEB」) 可收集、儲存及使用有關本人的個人資料 (定義見個人資料 (私隱) 條例)及轉移有關個人資料予美亞保險香港有限公司(下稱「美亞香港」)，用作處理有關此申請及日後續保及索償之用途。
2. 美亞香港可收集、儲存及使用有關本人在此申請表所載 (包括電子形式)的個人資料，用作處理「友邦保險代理人專業責任保險」申請之用途。有關美亞香港個人資料收集聲明可於美亞香港網址 (www.aig.com.hk) 下載及/或可向美亞香港索取。
3. 准許美亞香港發放本人就「友邦保險代理人專業責任保險」申報的索償或日後可能構成索償之任何情況，或在與其相關的情況下所提供的任何資料。
4. 除非本人發出取消保單的書面通知，否則此保單將於每年保障期屆滿日自動續保，並於保費繳付後生效。
5. 「友邦保險代理人專業責任保險」之保單持有人為LUSEB，及本人同意遵守此保單所載及不時修訂之條款。
6. 本人聲明
   i. 根據本人所知所聞，並沒有客戶向本人展開投訴 (不論是客戶本人或是由監管機構代為投訴)；及
   ii. 過往五年內本人並無任何被索償紀錄；及
   iii. 根據本人所知所聞，本人並無任何行為、疏忽、事件或情況會可能導致被索償。

   或者，上述任何一項屬於事實，然而美亞香港容許本人繼續投保此保單。
7. 所有此申請表內提供之資料、提問之答案及陳述乃根據本人所知，並確定完全正確無訛及完整。本人同意此投保表之內容、答案及聲明會成為本人與美亞香港訂立保險契約之根據。



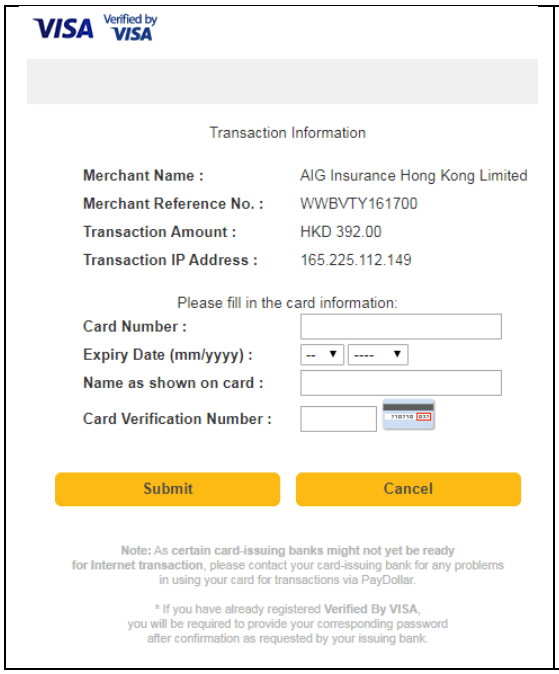
6

i. 選擇您的信用卡種類 (Visa / Master)。



ii. 信用卡的持有人不一定要是申請人，但如果您要使用他人之信用卡繳款，一定要先得到該信用卡持有人的允許。 完成交易後，系統會轉移到確認頁面。另外，系統亦會發出包含電子保險憑證、常見問題及保費表之電子郵件確認申請成功。

iii. 完成後，請小心保存保險憑證。





繳交逾期保費

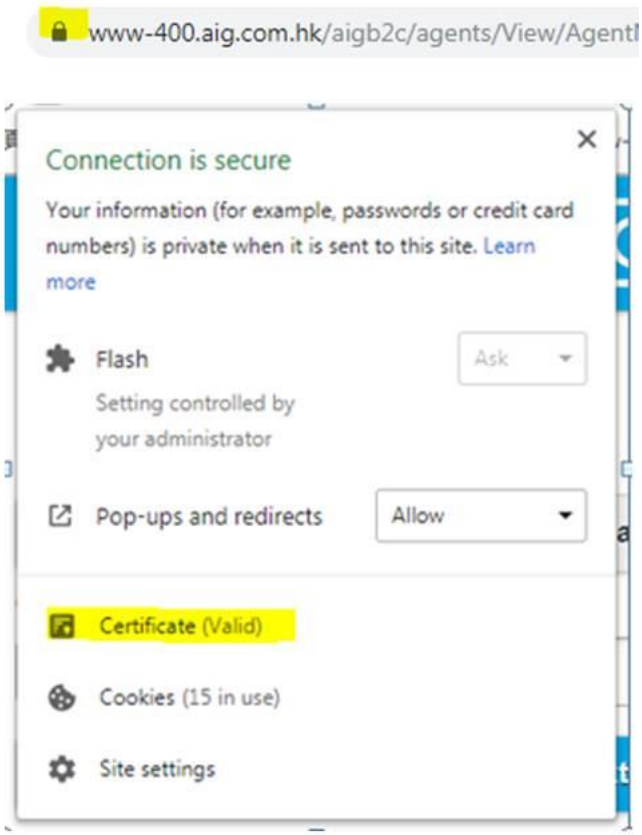
i. 如友邦未能代美亞保險於受保人之支薪帳戶內收取續保保費。

ii. 在上述情況發生時，系統會發電郵 / 手機短訊予受保人。而該電郵 / 手機短訊會包含一條獨立的連結到電子平台。

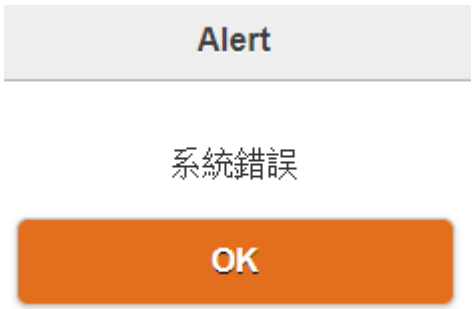
* 請確保網站地址以 “ https://www-400.aig.com.hk/ ” 為首。

* 請注意以下灰色鎖圖像表示為標準證書。(重要事項: 如果網站沒有加密圖像，則代表它是不安全的。請不要在未加密的網頁中輸入任何個人或信用卡資料。)

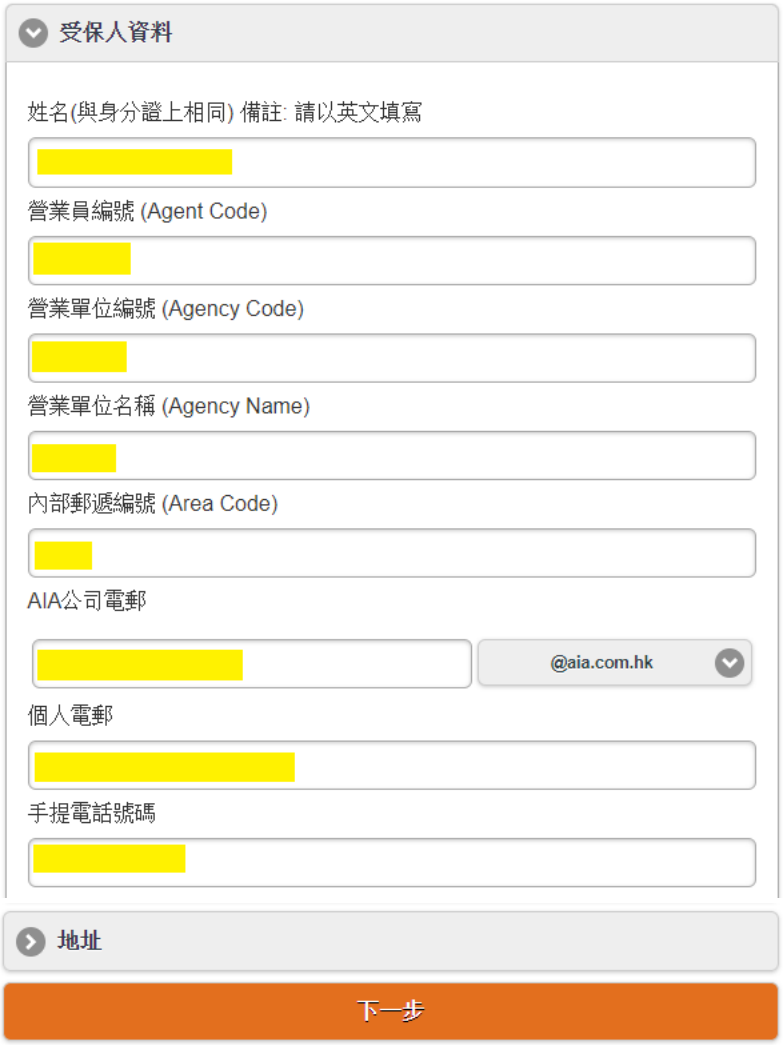




iii. 每一條連結都是獨立設立給個別受保人。必需輸入受保人的友邦營業員編號。如輸入不正確或輸入他人之營業員編號時，會有系統訊息提示。



iv. 輸入您的營業員編號成功登錄後，您的個人信息將顯示在下一頁中，請仔細檢查後再進入下一頁。



v. 請按「立即投保」進入繳費程序。



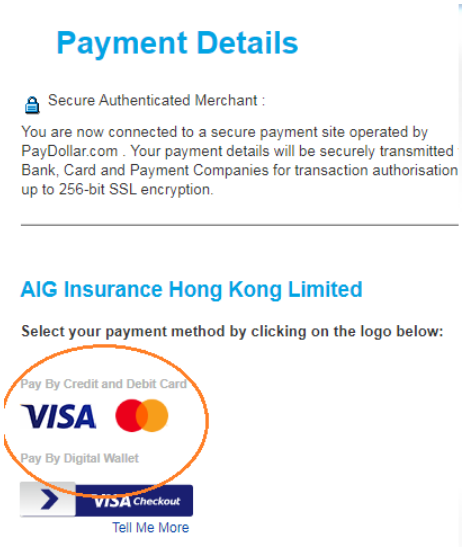
vi. 勾選「同意及確認」以確認閱覽並接受聲明及條款。

vii. 勾選「本人已閱讀及明白個人資料收集聲明，並同意接受其約束。」。

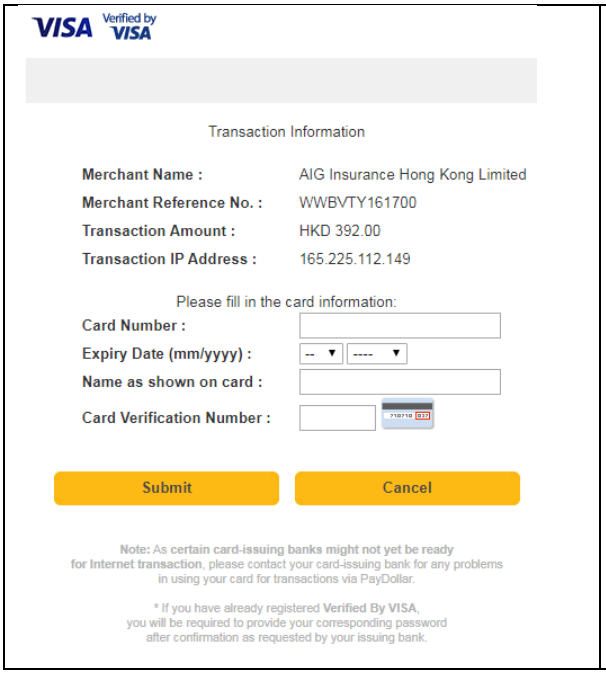
viii. 然後按「確認及付款」進入繳費程序。



ix. 選擇您的信用卡種類 (Visa / Master)。



x. 信用卡的持有人不一定要是申請人，但如果您要使用他人之信用卡繳款，一定要先得到該信用卡持有人的允許。 完成交易後，系統會轉移到確認頁面。另外，系統亦會發出包含電子保險憑證之電子郵件確認申請成功。





Professional Liability – AIA Agents Protector
The User Guide for Electronic Payment Platform

For first time enrolment - how to complete the application

Access to the e-Platform

Leader will receive an email from AIA after his new Financial Planner gets an Agent Code from AIA. The link and QR Code for access to the e-Platform for application and payment for the AIA Agents Protector will be included in the email.

Compatibility of the Platform

This Platform only works on:
Device : Smartphone or Tablet
Suggested Operating System: iOS or Android
Suggested Browser: Safari or Google Chrome

The Payment Gateway is only available for:
Credit Card: Visa or Master

Access to the AIA Agents Protector Video

Web address: https://www.youtube.com/watch?v=AiCuUyBA-UE&feature=youtu.be

1

i. Select your preferred language to be displayed in the application. However, the information you input must still be in **English**.

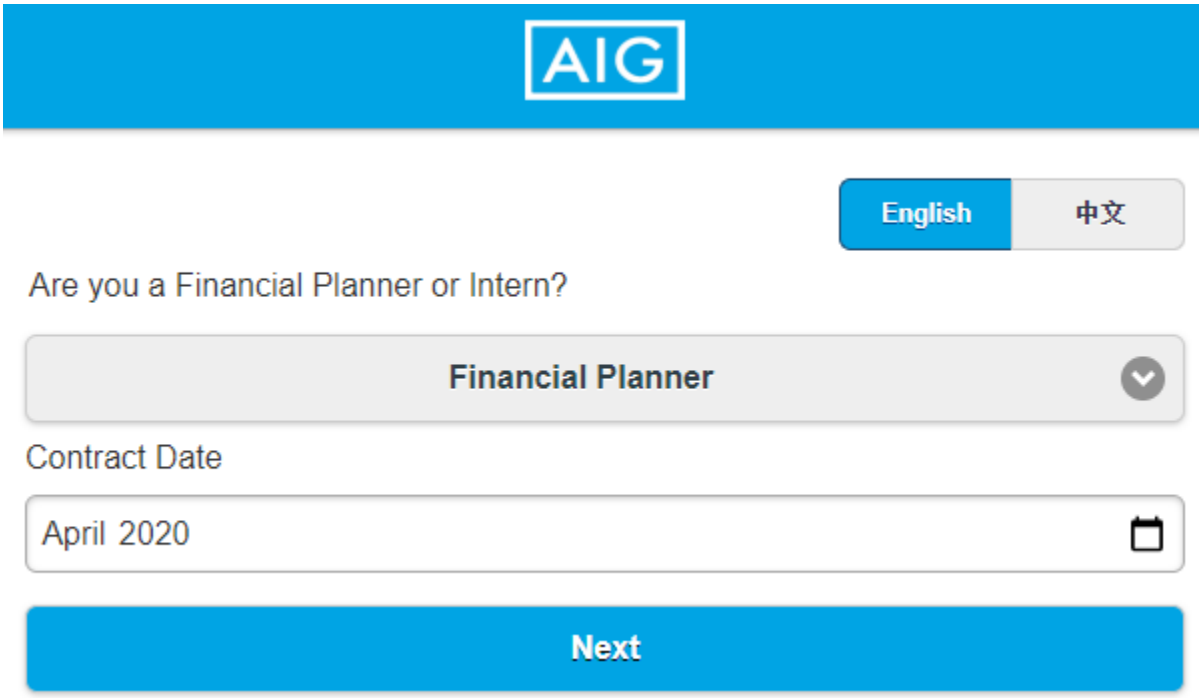
ii. Select your type of employment at AIA – **Financial Planner / Intern**.

iii. Select your contract date with AIA

Example:

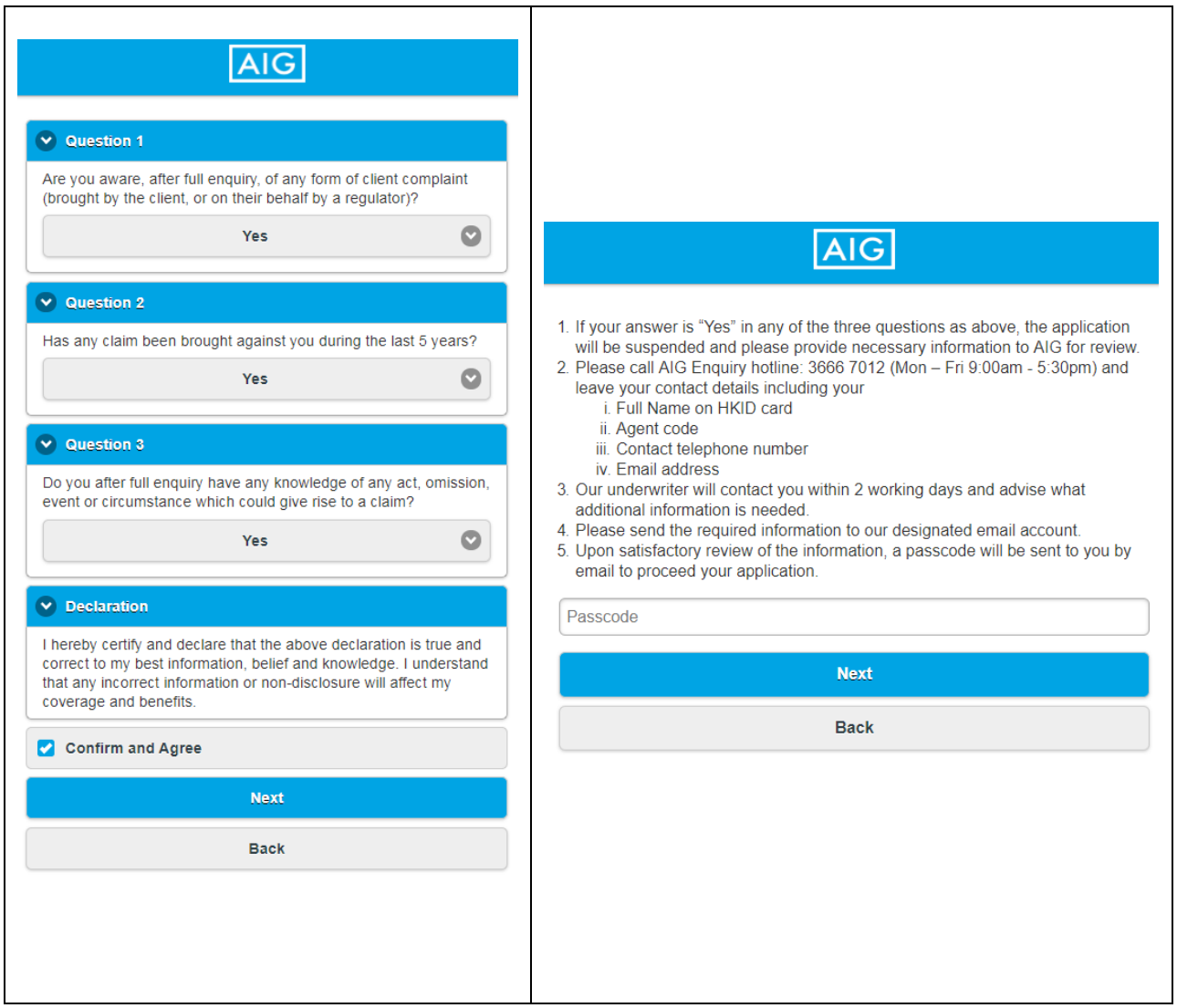
	Enroll on	Contract with AIA on	Policy Effective Date	Policy Expiring Date
For Inforce Financial Planner	April 01, 2020	Jan 01, 1990	May 01, 2020	Sep 30, 2020
For New Contracted Financial Planner	-	April 01, 2020	April 01, 2020	Sep 30, 2020

iv. Click “Next”.



2 (This page is not applicable for NEW Financial Planners who contract with AIA in less than 3 months before or after the date of application)

i. If your answer is "Yes" in any of the three questions as above, the application will be suspended and please provide necessary information to AIG for review.
ii. Please call AIG Enquiry hotline: 3666 7012 (Mon – Fri 9:00am - 5:30pm) and leave your contact details including your
    1) Full Name on HKID card
    2) Agent code
    3) Contact Telephone number
    4) Email address
iii. Our underwriter will contact you within 2 working days and advise what additional information is needed.
iv. Please send the required information to our designated email account.
v. Upon satisfactory review of the information, a passcode will be sent to you by email to proceed your application.



3

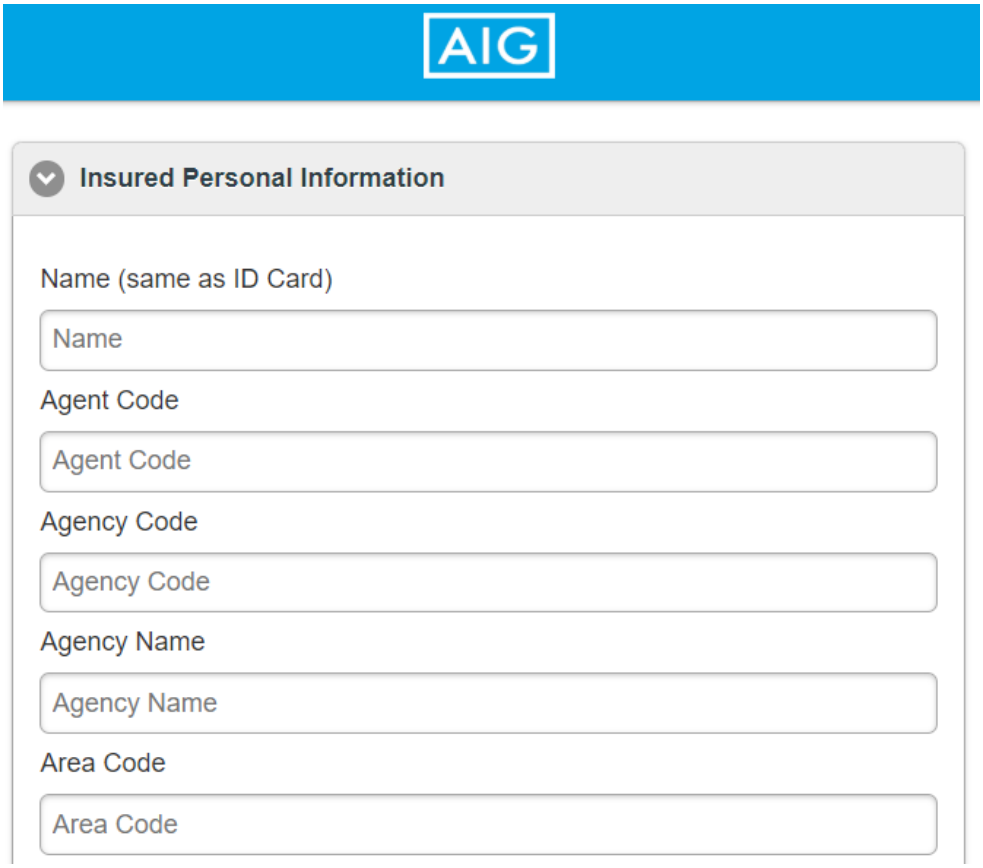
i. Enter your name in English (must be the same as the name shown on your identity card), and please put your **SURNAME at the FRONT**.

ii. Enter your **AIA Agent Code**.

iii. Fill in your **Agency Code** (please check with the secretary or leader of your team if you do not know).

iv. Fill in your **Agency Name** (please check with the secretary or leader of your team if you do not know).

v. Fill in your **Area Code** (please check with the secretary or leader of your team if you do not know).



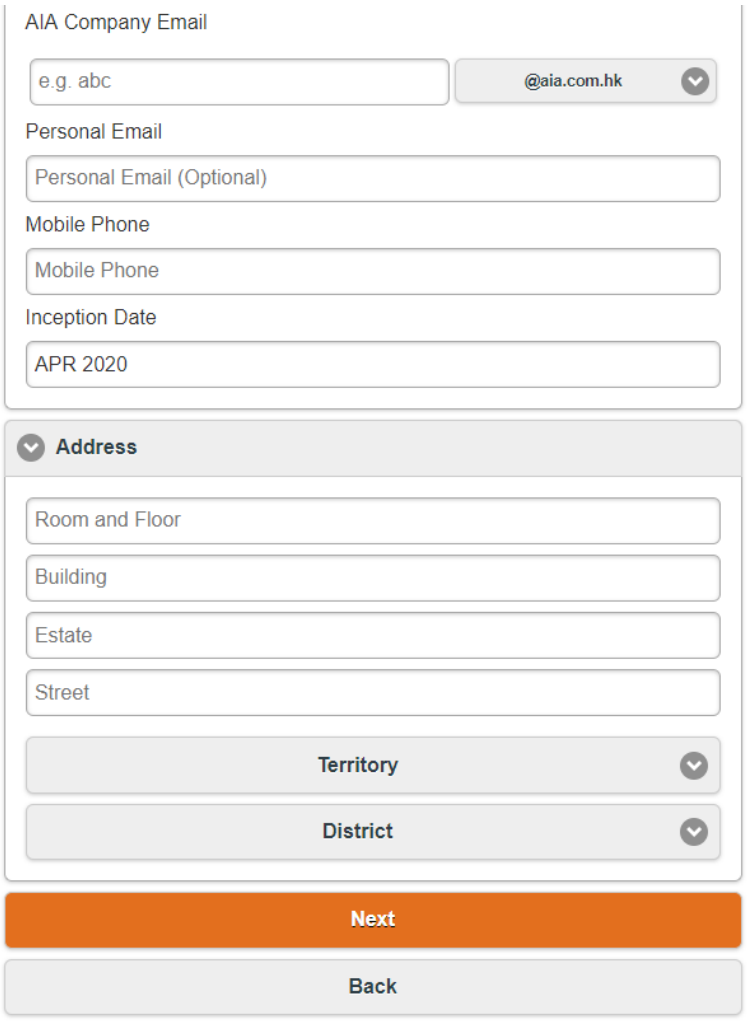
vi. Provide your **AIA Email** (@aia.com.hk/aia.com.mo) **and / or Personal Email**. This is very important that this is an email which you REGULARLY USE, as AIG will send Certificate of Insurance and Payment Reminder to this email address.

vii. Provide your **mobile number**. This is also very important as this will serve as the back-up contact method to email.

viii. Inception Date is automatically generated by the Platform. For NEW Financial Planners, application date within 3 months of Contract Date, Inception Date will be the same as Contract Date. For Financial Planners joined AIA for more than 3 months then apply, Inception Date will be the first day of next month, e.g. Contract Date is Jan 1st, enroll on Apr 1st and Inception Date will be May 1st.

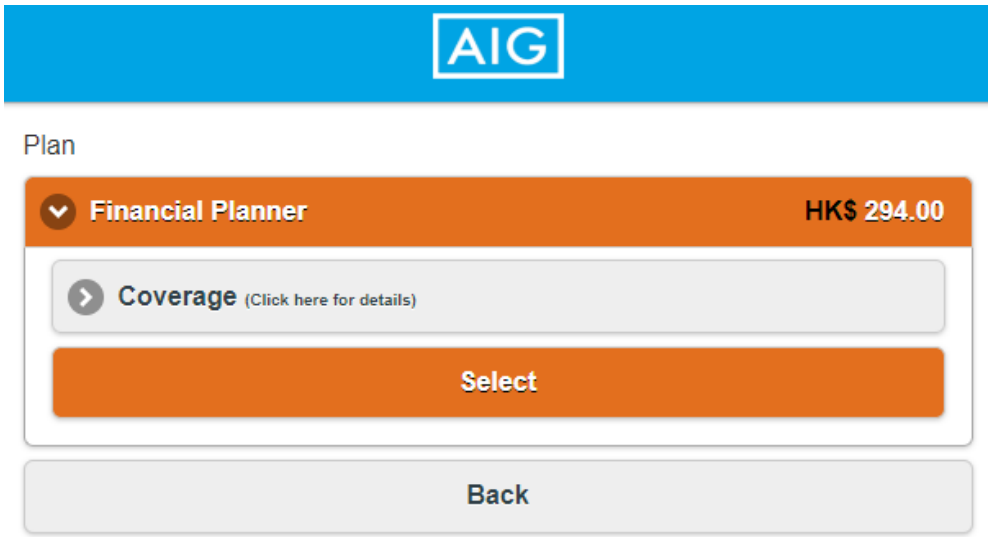
ix. Enter your **home address.**

x. Click “Next”.



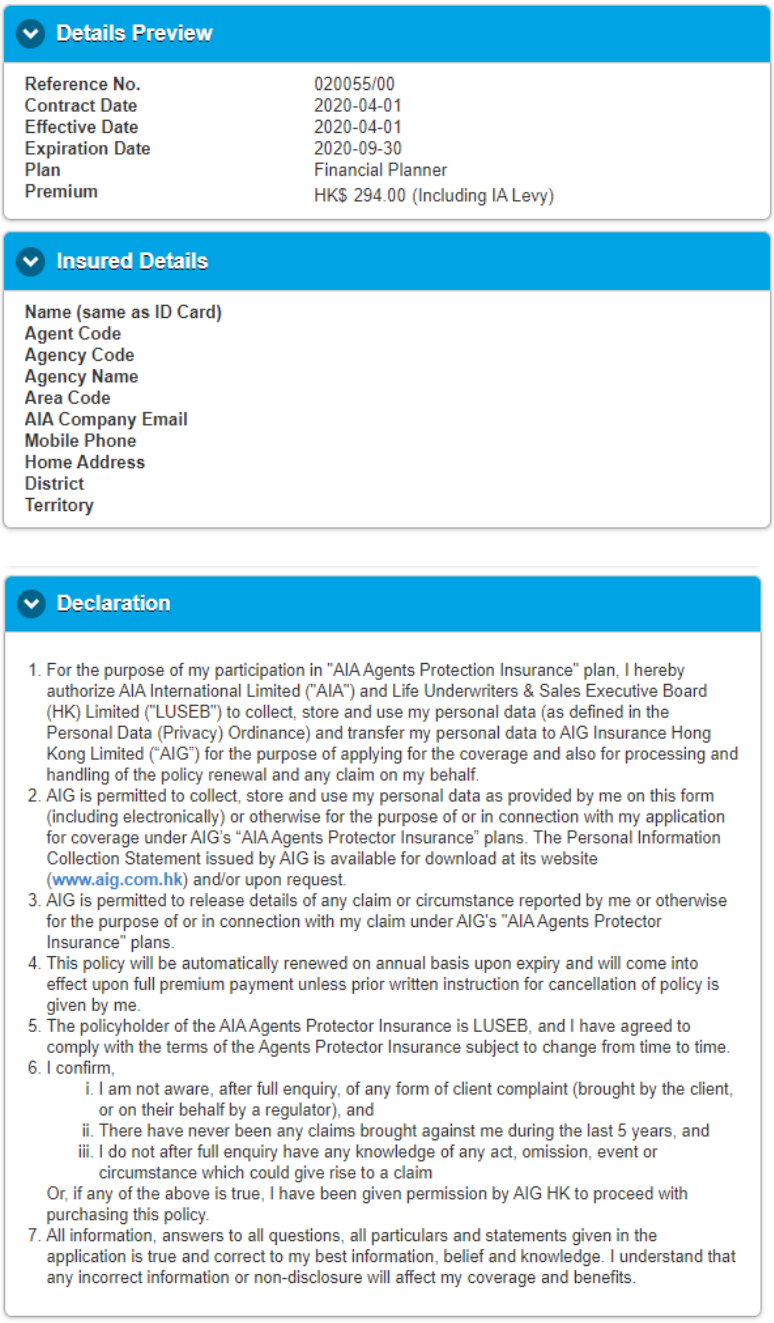
4

i. You may view the coverage summary by clicking “Coverage”. Then, you may choose your preferred option and proceed to next page by clicking the “**Select**” button under each option.



5

i. Verify information which you have input in this application and click “Correction” if you need to revise your application.
ii. Click “Confirm and Agree” after you have read and agreed with the declaration.
iii. Click to confirm the “Personal Information Collection Statement”.
iv. Click “Confirm for Payment” to make payment.



Details Preview

Reference No.	020055/00
Contract Date	2020-04-01
Effective Date	2020-04-01
Expiration Date	2020-09-30
Plan	Financial Planner
Premium	HK$ 294.00 (Including IA Levy)

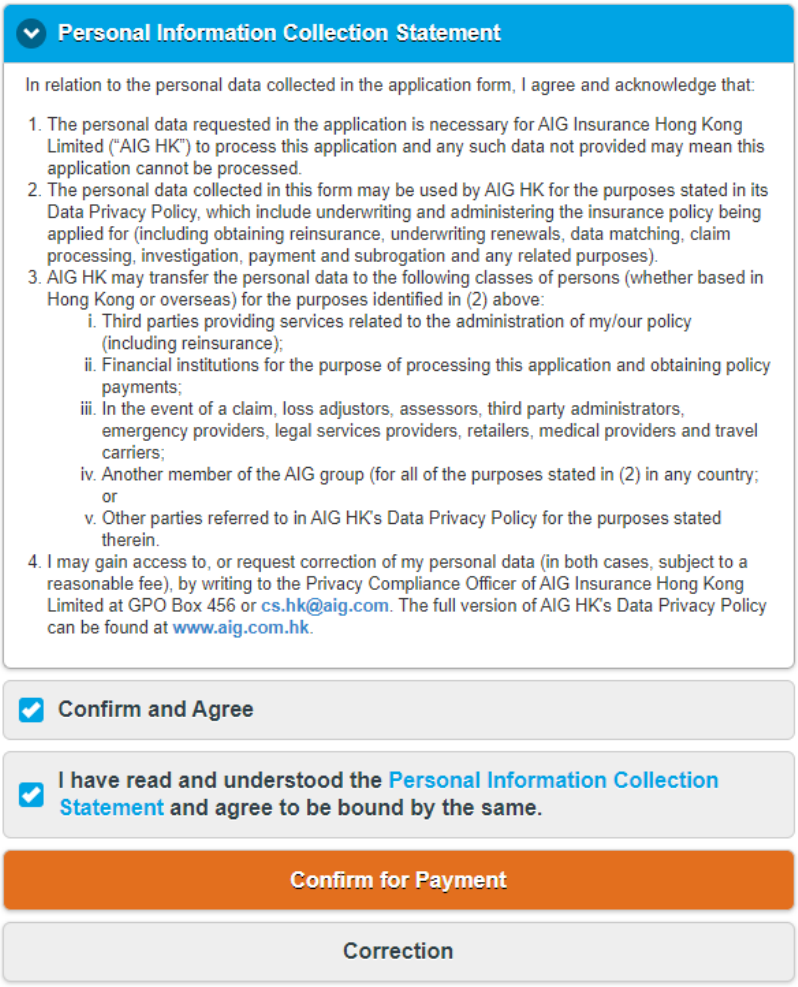
Insured Details

Name (same as ID Card)
Agent Code
Agency Code
Agency Name
Area Code
AIA Company Email
Mobile Phone
Home Address
District
Territory

Declaration

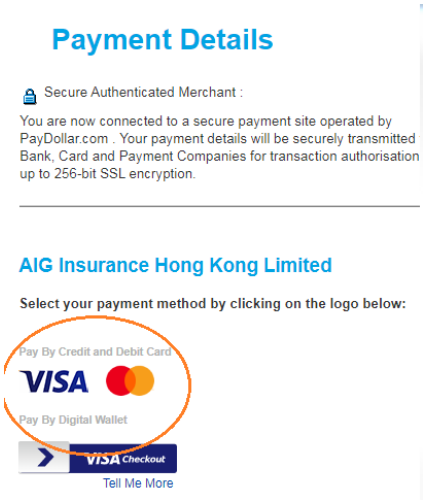
1. For the purpose of my participation in "AIA Agents Protection Insurance" plan, I hereby authorize AIA International Limited ("AIA") and Life Underwriters & Sales Executive Board (HK) Limited ("LUSEB") to collect, store and use my personal data (as defined in the Personal Data (Privacy) Ordinance) and transfer my personal data to AIG Insurance Hong Kong Limited ("AIG") for the purpose of applying for the coverage and also for processing and handling of the policy renewal and any claim on my behalf.
2. AIG is permitted to collect, store and use my personal data as provided by me on this form (including electronically) or otherwise for the purpose of or in connection with my application for coverage under AIG's "AIA Agents Protector Insurance" plans. The Personal Information Collection Statement issued by AIG is available for download at its website (www.aig.com.hk) and/or upon request.
3. AIG is permitted to release details of any claim or circumstance reported by me or otherwise for the purpose of or in connection with my claim under AIG's "AIA Agents Protector Insurance" plans.
4. This policy will be automatically renewed on annual basis upon expiry and will come into effect upon full premium payment unless prior written instruction for cancellation of policy is given by me.
5. The policyholder of the AIA Agents Protector Insurance is LUSEB, and I have agreed to comply with the terms of the Agents Protector Insurance subject to change from time to time.
6. I confirm,
    i. I am not aware, after full enquiry, of any form of client complaint (brought by the client, or on their behalf by a regulator), and
    ii. There have never been any claims brought against me during the last 5 years, and
    iii. I do not after full enquiry have any knowledge of any act, omission, event or circumstance which could give rise to a claim

   Or, if any of the above is true, I have been given permission by AIG HK to proceed with purchasing this policy.
7. All information, answers to all questions, all particulars and statements given in the application is true and correct to my best information, belief and knowledge. I understand that any incorrect information or non-disclosure will affect my coverage and benefits.



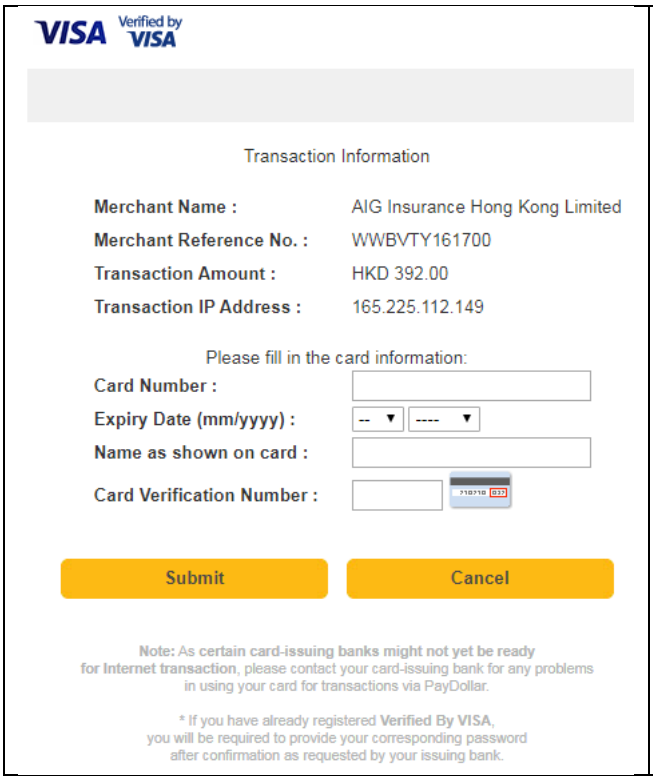
6

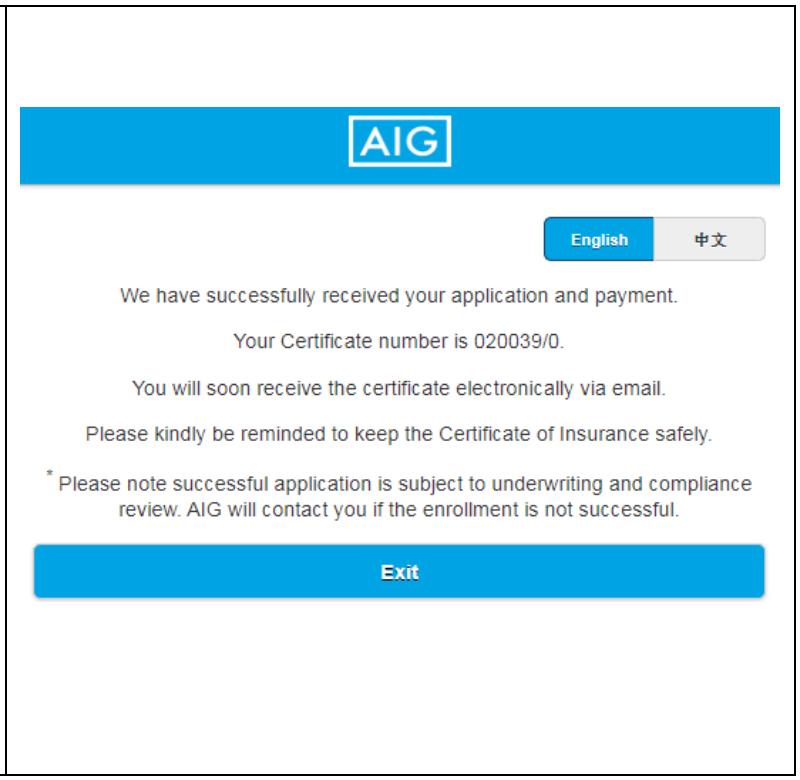
i. Select your card type on clicking on the logo of Visa / Master card.



ii. The Applicant needs NOT be the cardholder of the credit card, given that you have obtained consent of the cardholder for settling the payment using her / his card. You will be directed to the confirmation page upon completion of the transaction, and a confirmation email with Certificate of Insurance, FAQ, and Premium Schedule, will be sent to you.

iii. After finish, please keep the Certificate of Insurance safely.





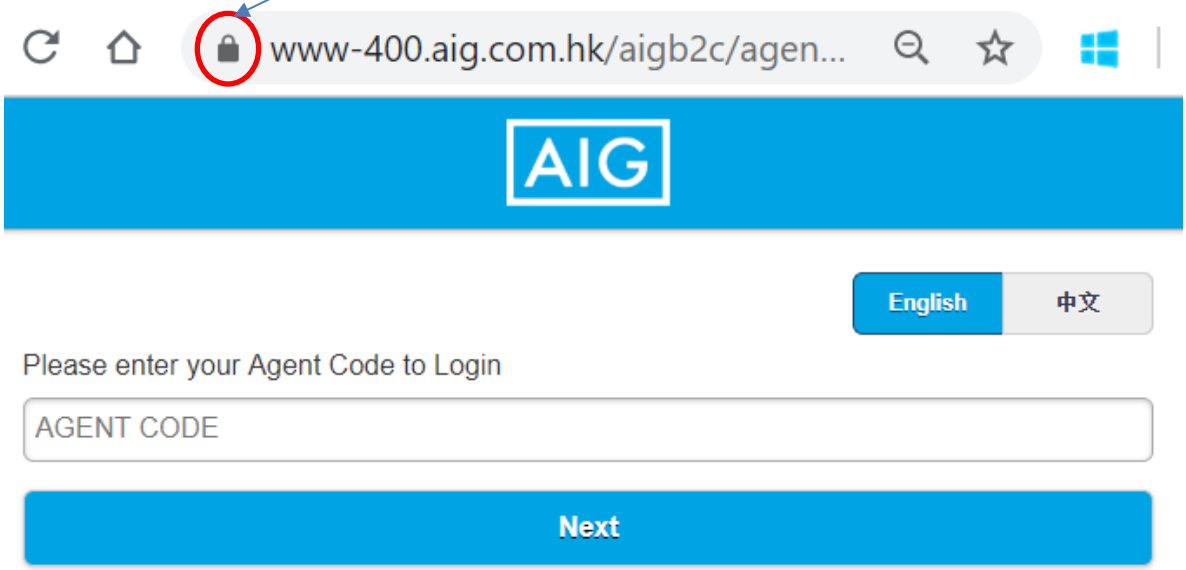
For settling overdue renewal payment

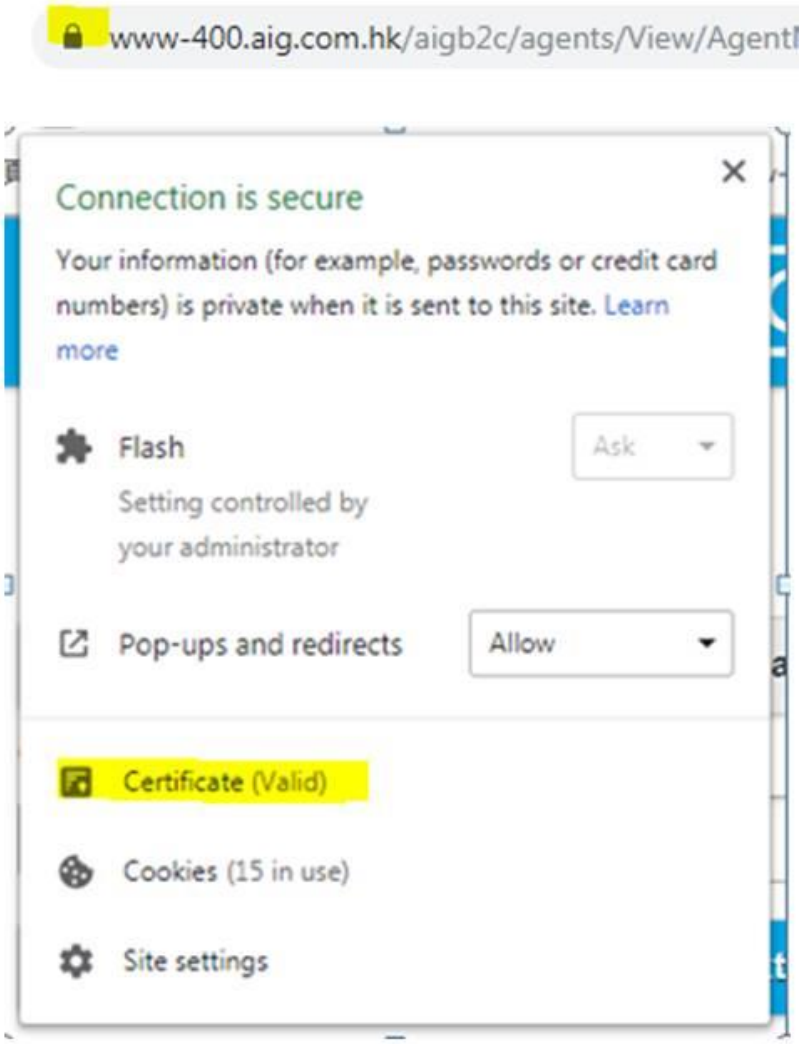
i. You only need to use the Platform for settling renewal premium if AIA is unable to debit premium from your payroll account.

ii. You will receive an email / SMS notification if you have outstanding renewal payment. And this email / SMS will contain dedicated link which directs to the Platform.

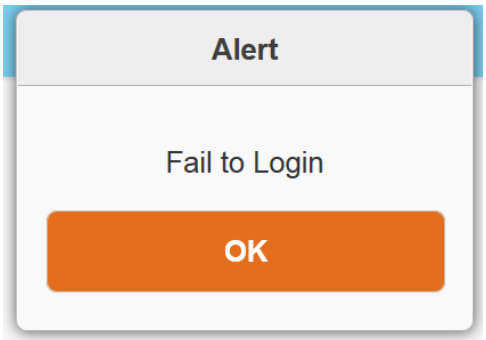
* please ensure the site address start with https://www-400.aig.com.hk/

* please be aware of the following grey lock icon indicates a standard certificate. (Important: it appears to be unsecure if a website doesn't have an encryption icon. Do not enter any personal or credit card information on a web page that isn't encrypted)

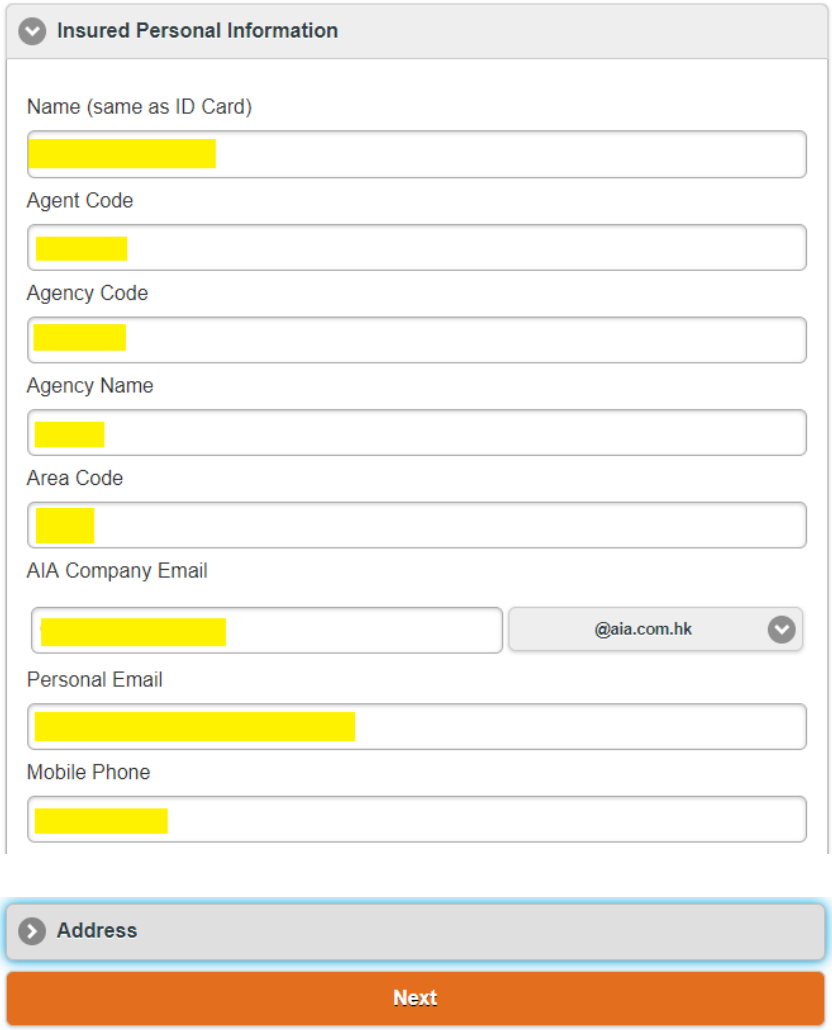




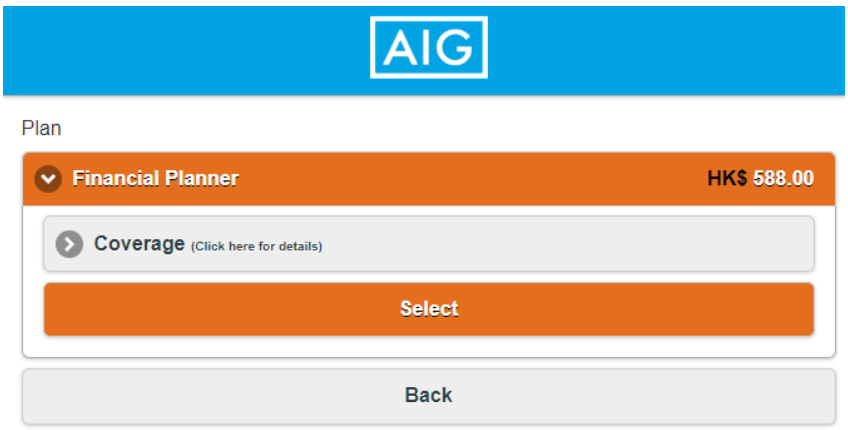
iii. This link is UNIQUE for EACH INSURED Agent. You can only login with your own agent code on this page, and alert message will pop up if you enter your agent code incorrectly.



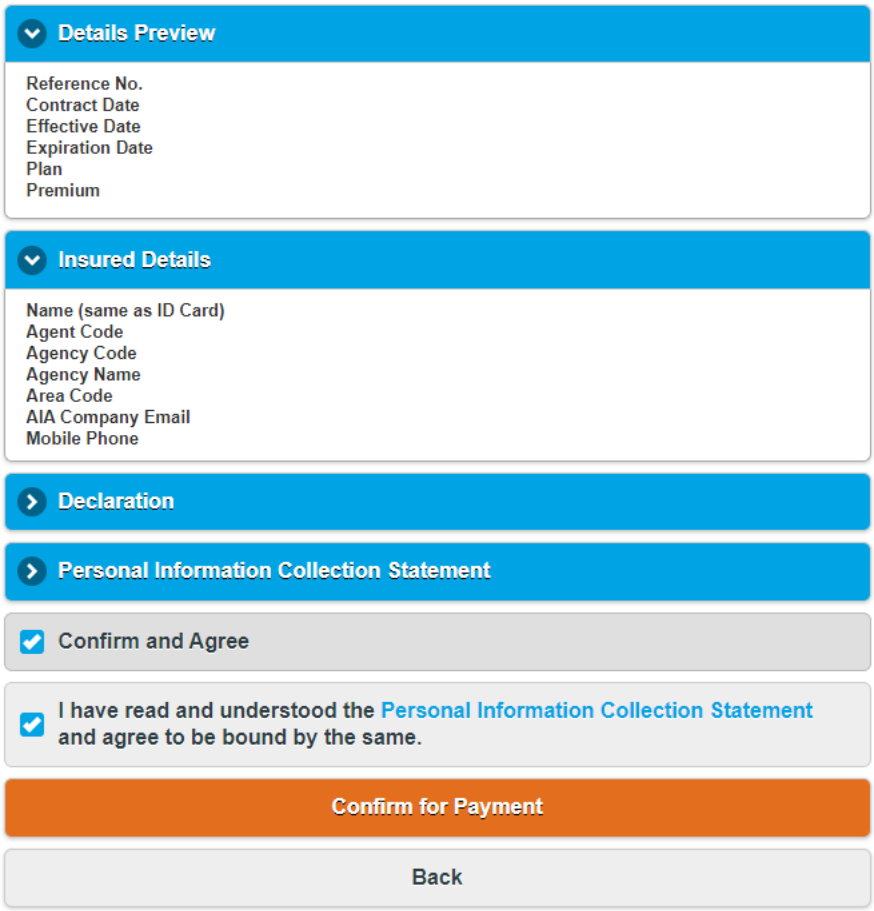
iv. After you successfully login with your own agent code, your personal information will be displayed in the following page, please check carefully before you go to the next page.



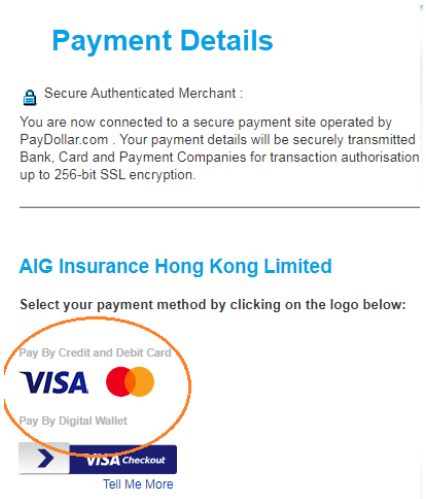
v. Please proceed to next page by clicking the “Select” button



vi. Click “Confirm and Agree” after you have read and agreed with the declaration.
vii. Click to confirm the “Personal Information Collection Statement.
viii. Click “Confirm for Payment” to make payment.



ix. Please select your credit card type on clicking on the logo of Visa / Master card.



x. You need NOT be the cardholder of the credit card, given that you have obtained consent of the cardholder for settling the payment using her / his card. You will be directed to the confirmation page upon completion of the transaction, and a confirmation email with Certificate of Insurance will be sent to you.

