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Attn:	All EDD & Honorable Advisors / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / Financial Planners (Hong Kong & Macau)	From:	Amelie Shen
Copy:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho / All Department Heads / ABDD Executives / Contact Centre	Dept:	Corporate Solutions
Date:	8 February 2024	Total pages:	4

Subject: **(A240243) 營業員團體醫療計劃 —「友心意 2」投保特別安排**
Agency Group Medical Program - Special Enrolment Arrangement of StepUp 2

企業業務（CS）現推出**「友心意」醫療保障計劃 2（「友心意 2」）投保特別安排**，所有合資格營業員可於 2024 年 2 月 15 日至 4 月 30 日期間之推廣期內**隨時投保「友心意 2」**，並享有首年 **9 折保費優惠**！

有關**「友心意 2」**參加資格及投保方法，詳情如下:

「友心意」醫療保障計劃 2

「友心意」醫療保障計劃 2（「友心意 2」）能以相宜保費為您及家人提供全面的終身醫療保障，毋須進行醫療核保，保證接納申請，受保項目包括已存在病症#，營業員可於「營業員專頁」下載計劃之詳情及查閱投保資格。

投保資格

1. 營業單位主管級別
   - ✓ 年齡為 69 歲或以下並受保於營業部團體醫療保險計劃；及
   - ✓ 須於過去 3 年必須達到合約內訂定維持合約的業績要求、團隊成員人數要求及續保率要求（請參閱「報酬及福利手冊 – 營業單位主管的 2.1 部分 – 維持合約要求」）；或
   - ✓ 須於過去一年獲得卓越營業單位主管（Premier Agency Leader）或以上的資格；或
   - ✓ 如未能符合上述要求，則須符合以下營業員級別的資格要求。



2. 營業員級別
   - ✓ 年齡為 69 歲或以下並受保於營業部團體醫療保險計劃；及
   - ✓ 須於過去 3 年獲得百萬金圓會（MDC）會員或以上的資格；或
   - ✓ 必須符合資格並已登記成為百萬圓桌會員 2023（MDRT 2023）或以上 （以業績計算）。
3. 營業單位主管或營業員（符合以上資格並受保於營業部團體醫療保險計劃 M 或 S）之家屬（如適用）
   - ✓ 法定配偶，年齡為 69 歲或以下並受保於營業部團體醫療保險計劃；或
   - ✓ 未婚子女，年齡為 15 日至 18 歲（如屬全日制學生可延伸至 22 歲），並受保於營業部團體醫療保險計劃。

查閱投保資格

路徑：營業員專頁 > 成績報告 > Production Reports > 友心意 2 自選醫療計劃投保資格 > Report

註：

若您於 AIA 團體醫療保險計劃及「友心意 2」下合共受保至少連續 12 個月，在受保前已存在的疾病將在「友心意 2」下受到保障。

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如何參加？

- 香港營業員可經 iPoS 或「友聯繫」遞交申請 ，而澳門營業員可經 iPoS 遞交申請；投保申請必須於 **2024 年 4 月 30 日或之前**遞交。
- 透過「友聯繫」遞交申請程序（只適合非持有卷二 [一般保險] 牌照的香港營業員）：
  登入「友聯繫」→ 選擇「瞭解個人自選保障方案」→ 按「確認」→ 按「探索產品」→ 按「立即申請」
- 透過 iPoS 遞交申請程序（只適合香港持有卷二 [一般保險] 牌照的營業員及所有澳門營業員）：
  登入 iPoS > 聯絡資料 > 新增聯絡資料（請依照指示填寫其他相關個人資料）



- 申請時需要輸入「成員編號」，「成員編號」為一組 10 位字元的號碼或英文字母組合，組合為 **000 + 營業員編號 + 01/02/03**
  01 為營業員
  02 或 03 為配偶或子女
  成員亦可於醫療咭上參考「成員編號」



請注意：

- 「友心意 2」提供的計劃選擇為計劃一或計劃二。
- 持有卷二 [一般保險] 牌照的營業員（只適用於香港）及所有澳門營業員，可處理其個人及合資格家屬（如適用）的「友心意 2」投保申請，並可獲發「友心意 2」的營業員佣金。
- 只適用於香港：若營業員並未持有卷二 [一般保險] 牌照，其個人及合資格家屬（如適用）的「友心意 2」投保申請將以公司直接銷售保單方式處理。若營業員其後取得卷二 [一般保險] 牌照，可於之後的保單週年日將其個人及合資格家屬（如適用）之「友心意 2」保單轉移至該營業員處理，惟該營業員並不會獲發「友心意 2」的續保佣金。
- 經「友聯繫」申請「友心意 2」的營業員將不會獲發「友心意 2」的佣金。
- 詳情請參閱計劃小冊子。

如有任何查詢，歡迎致電：

- 香港：2232 8238
- 澳門：0800 311

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Corporate Solutions (CS) is now offering a special enrolment arrangement for StepUp Medical Protection Plan 2 ("StepUp2"). All eligible Financial Planners can apply for StepUp 2 anytime during the promotional period, i.e. from 15 February to 30 April 2024, and enjoy a 10% discount on the first year's premium!

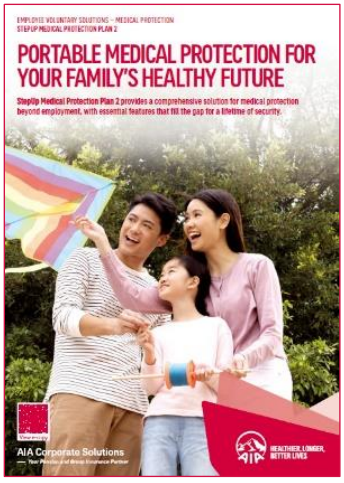
Details of the eligibility and how to apply are stated as follows:

StepUp Medical Protection Plan 2

StepUp Medical Protection Plan 2 ("StepUp 2") provides comprehensive lifetime medical protection for you and your family members at an affordable premium. There is no medical underwriting requirement and your application is guaranteed to be accepted. Any pre-existing conditions will also be covered[#]. Financial Planners can download the plan details and check your eligibility from "Agency Corner".

Eligibility

1. Agency Leader Level
   - ✓ Aged 69 or below and being insured under the Agency Group Medical Programme; and
   - ✓ Must comply with the Contract Maintenance's Production Requirement, Manpower Requirement and Persistency Requirement (please refer to section 2.1 – Contract Maintenance in Compensation and Benefits Manual – Agency Leader) over the past 3 years; OR
   - ✓ Must qualify as Premier Agency Leader or above for the previous year; OR
   - ✓ If the requirements above are not met, then the eligibility of Financial Planner Level below must be met.



2. Financial Planner Level
   - ✓ Aged 69 or below and being insured under Agency Group Medical Programme;
   - ✓ Must qualify for Million Dollar Club (MDC) or above for the past 3 years; OR
   - ✓ Must be qualified and registered for Million Dollar Round Table 2023 (MDRT 2023) or above (by Production).
3. Dependents of Agency Leader or Financial Planner (who meet the above eligibility and be insured under Plan M or S of Agency Group Medical Programme, if applicable)
   - ✓ Legal spouses aged 69 or below and being insured under Agency Group Medical Programme; OR
   - ✓ Unmarried children aged between 15 days and 18 years old (full-time students can be extended to 22 years old) and being insured under Agency Group Medical Programme.

To Check the Eligibility

Path: eAC > Production > Production Reports > StepUp 2 – Voluntary Top Up Eligible List > Report

Notes:

[#] If you have been covered under AIA group medical insurance scheme and StepUp 2 for a total duration of at least 12 continuous months, the pre-existing conditions will be covered under StepUp 2.

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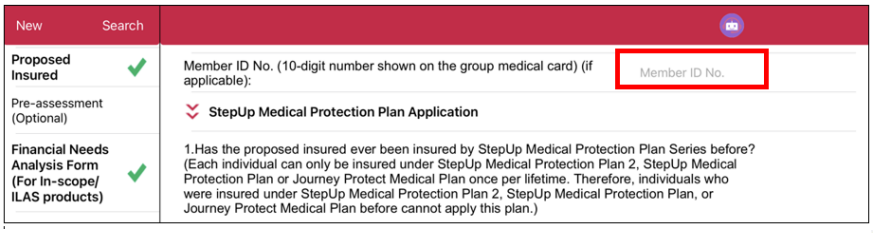
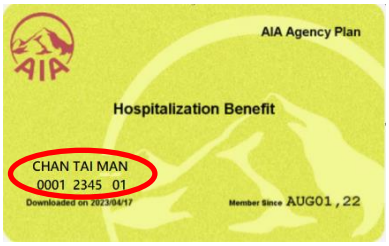
How to Enrol?

- For Hong Kong Financial Planners, please enrol through "iPoS" or "AIA Connect", for Macau Financial Planners, please enrol through "iPoS". Enrolment must be completed **before on or 30 April 2024**.
- "AIA Connect" application procedures (Applicable to Hong Kong Financial Planners without the Paper 2 [General insurance] Licence):

  Login to "AIA Connect" → click "Discover Individual Voluntary Protection" → click "Confirm" → click "Explore the product" → click "Apply Now"
- "iPoS" application procedures (Applicable to Hong Kong Financial Planners with the Paper 2 [General insurance] Licence and all Macau Financial Planners):
  Login to iPoS > Contact Information > Add Contact Information (please follow the instructions to fill in the relevant personal information)



- You are required to input "Member ID No." for enrolment, "Member ID No." is a combination of 10-charater numbers or English letters, the combination is **000 + Agent Code + 01/02/03**
  01 is Financial Planner
  02 or 03 is Spouse or Child
  the "Member ID No." is embossed on the Medical Card



Important Notes:

- The Plan choice of StepUp 2 can either be Plan 1 or Plan 2.
- Financial Planners with the Paper 2 [General insurance] Licence (applicable to Hong Kong only) and all Macau Financial Planners can process the StepUp 2 application of their own and their eligible dependents (if applicable) and will also be entitled to receive the commission of StepUp 2.
- Applicable to Hong Kong only: If the Financial Planner does not hold the Paper 2 [General insurance] Licence, the StepUp 2 application from the Financial Planner and their eligible dependents (if applicable) will be treated as direct case. If the Financial Planner obtains the Paper 2 [General insurance] Licence later, the StepUp 2 policies of his/her own and his/her eligible dependents (if applicable) can be assigned to that Financial Planner on the next policy anniversary. However, such Financial Planner will not be entitled to receive the renewal commission of StepUp 2.
- Financial Planner apply for StepUp 2 through "AIA Connect" will not be entitled to StepUp 2 commission.
- For details, please refer to the product brochure.

If you have any queries, please contact:

- Hong Kong: 2232 8238
- Macau: 0800 311

Yours faithfully,

Amelie Shen
Chief Corporate Solutions Officer
AIA Hong Kong and Macau

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