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Attn	:	All EDDs & Honourable Advisors / EDDs/ PSDDs/ SDDs/ DDs/ MICs/Agency Leaders	Dept	:	Premier Agency Development Department
Copy	:	Mr. Alger Fung / Mr. Jim Jan Zen / Mr. Louie Ho/ All Department Heads / ABDD Executives			
Date	:	30 April 2024	Total Page	:	5

Subject: **(A240490) 更新入職要求(香港)---必須完成友邦事業發展潛能測試(CAT)及友邦人工智能面試(AI Interview)**

發展優質營業團隊一直是我們的業務策略，友邦事業發展潛能測試(CAT) 及友邦人工智能面試（AI Interview）自推出以來通過智能分析及大數據協助各位招募者在篩選人才，申請財務津貼計劃及管理營業隊伍中發揮著便利且重要的作用。有鑒於此，我們將 CAT 及 AI 面試的要求擴大至所有新入職之財務策劃顧問，並將於 2024 年 5 月 18 日起，作出以下更新：

1. 所有於 2024 年 6 月 1 日(合約生效日期) 及以後入職*之新晉財務策劃顧問，必須完成友邦事業發展潛能測試(CAT) 及友邦人工智能面試（AI Interview）或 對應要求之實體面試（*以合約生效日期爲準）
2. 詳細要求如下：

表一：友邦事業發展潛能測試 及 友邦人工智能或實體面試之要求

（適用於 2024 年 6 月 1 日(合約生效日期)及以後入職之新晉財務策劃顧問）

<table>
<tr><td colspan="2">申請類別</td><td>財務策劃實習生
Internship</td><td>財務策劃顧問
Financial Planner</td><td>友邦精英學院成員
AIAPA</td><td>友邦精英學院
行政優才發展計劃
AIAPA-EDP</td></tr>
<tr><td colspan="2">友邦事業發展潛能測試 (CAT)之要求</td><td colspan="4">必須完成</td></tr>
<tr><td rowspan="6">人工智能面試及實體面試要求</td><td>無需申請財務津貼計劃</td><td colspan="2">人工智能面試 – FP</td><td>人工智能面試-AIAPA</td><td rowspan="3">EDP 計劃
實體面試
(EDP Panel Interview)</td></tr>
<tr><td>申請 High Fly2 或
PA18 MB2/FP12 MB2
(HK$15,000 MB 或以下）</td><td>不適用</td><td>人工智能面試 – FP</td><td>人工智能面試-AIAPA</td></tr>
<tr><td>PA18 MB2/FP12 MB2
(HK$16,000 MB 或以上)</td><td>不適用</td><td rowspan="2">營業拓展部
津貼計劃面試</td><td>人工智能面試-AIAPA
及
營業拓展部
津貼計劃面試</td></tr>
<tr><td>申請 TTFS 津貼計劃</td><td>不適用</td><td rowspan="2">EDP 計劃
實體面試
及
營業拓展部
津貼計劃面試</td></tr>
<tr><td>申請 EDP Elite 津貼計劃</td><td>不適用</td><td>不適用</td><td>不適用</td></tr>
<tr><td>申請 STAR LOU,BANK LOU, OR STAR-Lite 計劃</td><td>不適用</td><td>營業拓展部
津貼計劃面試</td><td>不適用</td><td>不適用</td></tr>
<tr><td colspan="2">附加文件</td><td colspan="4">如未能通過人工智能面試或實體面試，營業拓展部或卓越營業發展部可要求申請人遞交以下文件，作進一步的審批：
1. Project 100 及/或
2. Marketing Plan</td></tr>
</table>

請參考附錄：

附錄一:簡單三步完成友邦事業發展潛能測試(CAT)流程
附錄二: 簡單四步完成友邦人工智能面試（AI Interview）流程
附錄三: 簡單四步完成 AIAPA-EDP 實體面試流程

如有任何查詢, 請聯絡 Premier Agency Development Department （電郵: aiahk.premieragency@aia.com)

Premier Agency Development Department

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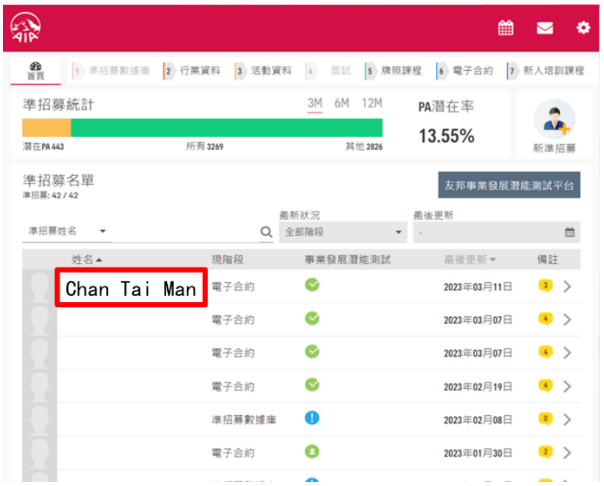
附錄一：簡單三步完成友邦事業發展潛能測試(CAT)流程

1. <u>第一步: 建立及點選準招募個人檔案</u> 於友招募(iRecruit)首頁的準招募名單點選準招募姓名	
2. <u>第二步: 發送友邦事業發展潛能測試至準招募</u> **以遠程方式完成測試-** 主管/招募者可點選「向準招募發送測試」以電郵傳送測試連結到準招募的電子郵箱 **與主管/招募者同場完成測試-** 主管/招募者可點選「立即啟動測試」讓準招募直接於該視窗內完成測試	
3. <u>第三步:準招募完成友邦事業發展潛能測試</u> 如主管/招募者選取「向準招募發送測試」，準招募將收到友邦事業發展潛能測試的電郵(如圖 3.1)，準招募可點擊鏈結及以手機號碼接收一次性驗證碼啟動測試 如主管/招募者選取「立即啟動測試」，準招募可直接啟動測試(如圖 3.2)	圖 3.1  圖 3.2 

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4. 準招募完成測試後，主管/招募者將收到由系統發出的電子郵件	
5. 如欲查閱測試結果，主管/招募者可選擇以下兩種方式下載或發送報告 方式一: 直接從電子郵件上的鏈結打開報告(如圖 4)， 鏈結有效期為 14 天 方式二: • 前往友招募(iRecruit) • 點擊「友邦事業發展潛能測試平台」(如圖 5.1) • 點擊下載圖標( )下載經理/準招募版本的報告(如圖 5.2) 或 • 點擊電郵圖標(✉) 發送準招募報告至準招募郵箱(如圖 5.2)	圖 5.1  圖 5.2 

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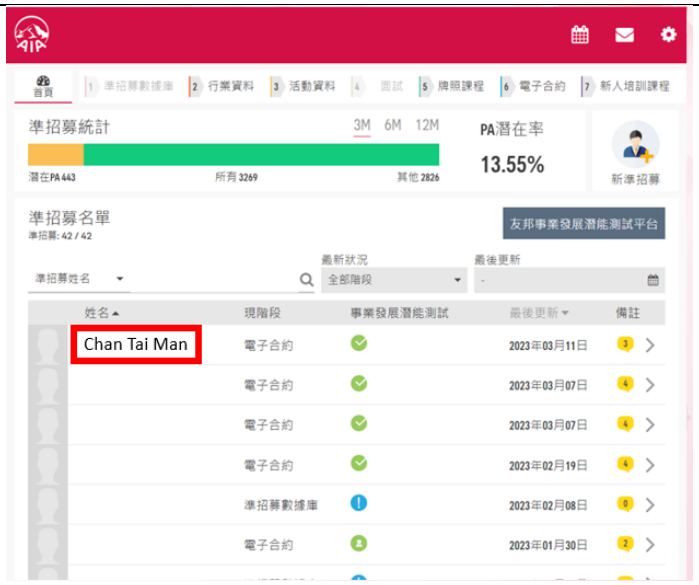
附錄二: 簡單四步完成友邦人工智能面試（AI Interview）流程

1. <u>第一步: 建立及點選準招募個人檔案</u>

於友招募(iRecruit)首頁的準招募名單點選準招募姓名



2. <u>第二步:輸入所需資料及提交文件</u>

2.1 -預約面試前，請填寫以下資料

- 於準招募個人檔案中的**個人資料**部份填寫身份證號碼及出生日期(如圖 2.1.1 及圖 2.1.2)
- (AIAPA 適用) 於準招募個人檔案中的**就業詳情**部份填寫工作年資(如圖 2.1.3)
- (AIAPA 適用) 於準招募個人檔案中的**學歷詳情**部份填寫所有有關學歷的資料(如圖 2.1.4)

圖 2.1.1



圖 2.1.2



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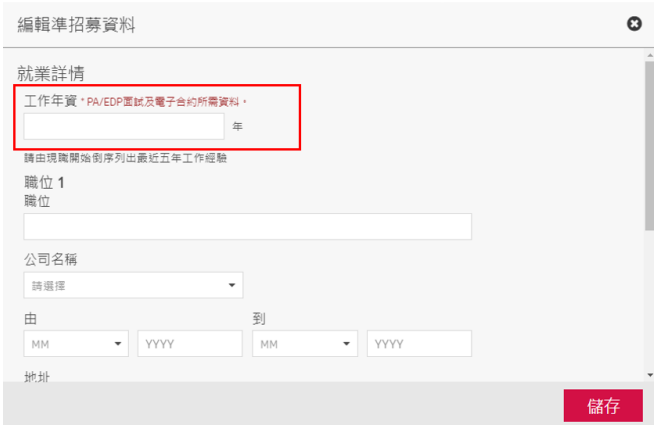
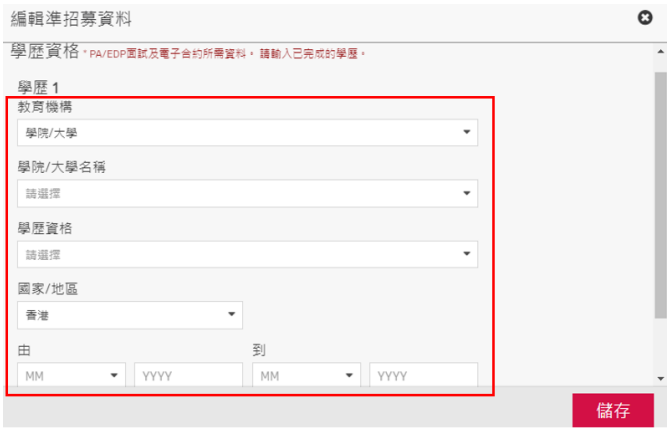
	圖 2.1.3  圖 2.1.4 
2.2 - 預約 AIAPA/ FP 面試前，請於文件管理頁面提交以下文件(如圖 2.2.1 及 2.2.2) • 香港身份證 (非香港永久性居民可以護照或往來港澳通行證代替) • 學歷/專業資格證明 • 履歷表	圖 2.2.1 

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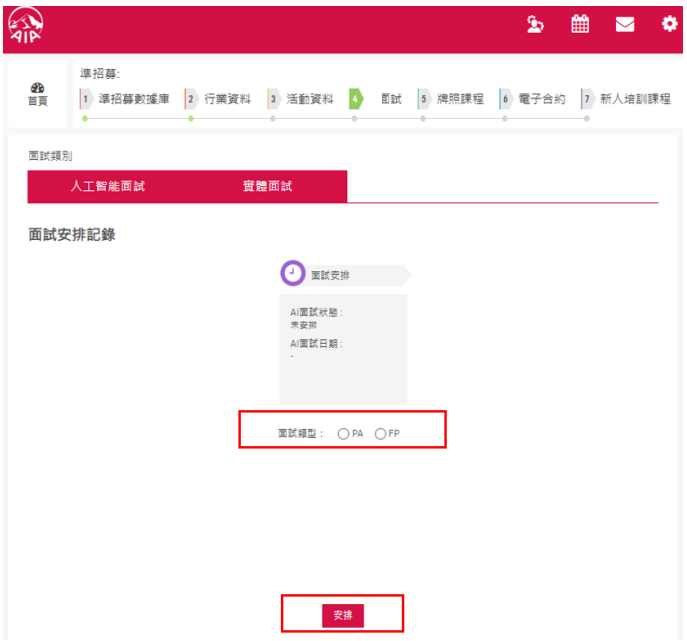
	圖 2.2.2 
3. <u>第三步: 為準招募預約面試</u> 於友招募(iRecruit)的頂部導航欄點擊「4- 面試」(如圖 3)	
4. 選擇適合準招募的面試類型(如圖 4)，然後點擊「安排」 **提示: 如欲預約 AIAPA 面試**，請確保準招募符合以下資格 • 擁有大學學位或同等學歷 及 • 年齡為 35 歲或以下 及 • 擁有至少一年或以上及沒有保險公司/ IFA 保險銷售經驗	

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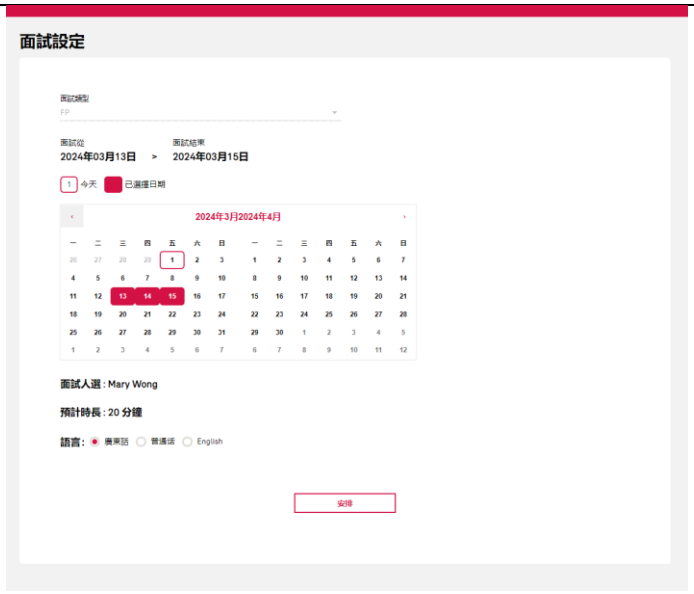
5. 選取 3 天面試日期及面試語言(準招募可於選取的日子期間完成面試)，點擊「安排」	 
6. **<u>第四步: 準招募完成面試</u>** 主管/招募者完成預約後，準招募將收到友邦人工智能面試系統發出的電郵(如圖 6.1) 準招募點擊鏈結後即可開始約 20 分鐘的人工智能面試，完成人工智能面試後，系統會顯示「面試已結束，你可以隨時離開」字句(如圖 6.2) ，而主管/招募者則會收到由系統發出的電郵通知	圖 6.1 

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	圖 6.2 
7. 如欲查閱友邦人工智能面試結果，主管/招募者可點擊「4- 面試」查閱面試結果(如圖 7.1) 以下狀態代表準招募已達成面試要求(如圖 7.2) • 於 AI 面試框內面試狀態為「完成」，且結果為「合格」 • 於 AI 面試框內面試狀態為「完成」，結果為「其他-面試結果審查中」，且「面試官審批」框結果為「通過」(一般需要 1-2 個工作天)(圖 7.2)	圖 7.1  圖 7.2 

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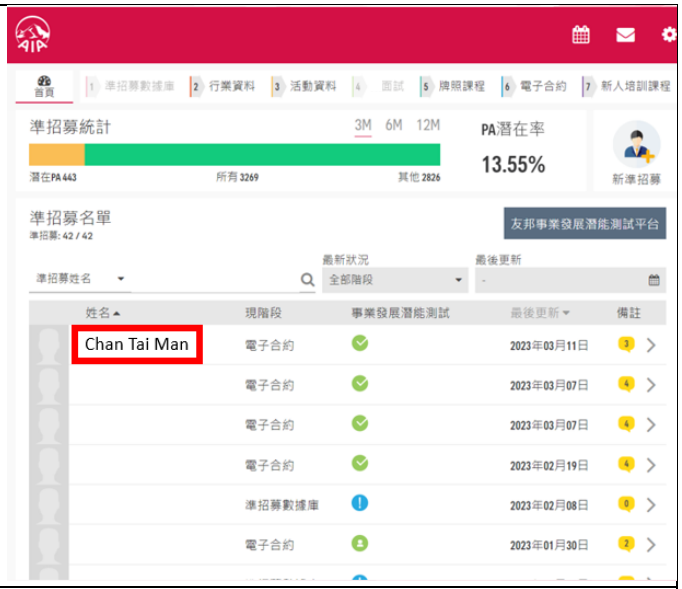
附錄三: 簡單 4 步完成 AIAPA-EDP 實體面試流程

1. <u>第一步: 建立及點選準招募個人檔案</u>

於友招募(iRecruit)首頁的準招募名單點選準招募姓名

提示: 如欲預約 AIAP-EDP 面試，請確保準招募符合以下資格

- 擁有大學學位或同等學歷 及
- 年齡為 45 歲或以下 及
- 至少五年或以上及沒有保險公司/ IFA 保險銷售經驗 及
- (39 歲或以下人士適用)年度收入不低於 30 萬港元
- (45 歲或以下人士適用)年度收入不低於 50 萬港元



2. <u>第二步:輸入所需資料及提交文件</u>

2.1 -預約面試前，請填寫以下資料

- 於準招募個人檔案中的**個人資料**部份填寫身份證號碼及出生日期(如圖 2.1.1 及圖 2.1.2)
- 於準招募個人檔案中的**就業詳情**部份填寫<u>工作年資</u>(如圖 2.1.3)
- 於準招募個人檔案中的**學歷詳情**部份填寫所有有關<u>學歷</u>的資料(如圖 2.1.4)
- 於準招募個人檔案中的**其他資料**部份填寫現時<u>年薪</u>(如圖 2.1.5 及圖 2.1.6)

圖 2.1.1



圖 2.1.2



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圖 2.1.3

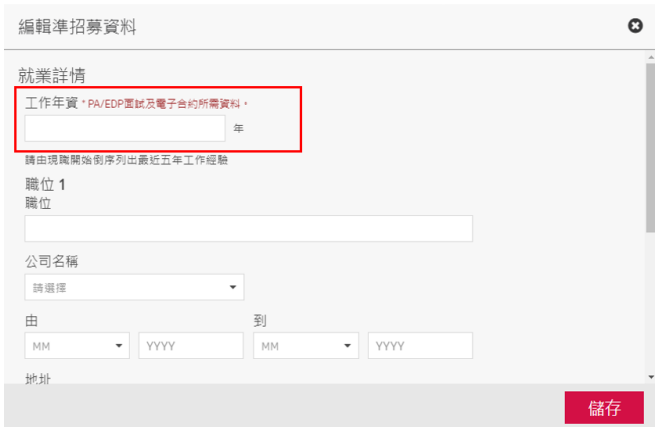

圖 2.1.4

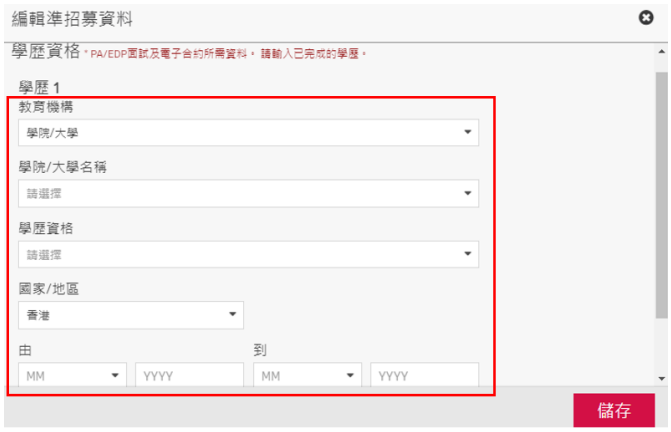

圖 2.1.5



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<table>
<tr>
<td></td>
<td>圖 2.1.6

</td>
</tr>
<tr>
<td>2.2 - 預約 AIAPA-EDP 面試前，請於文件管理頁面提交以下文件(如圖 2.2.1 及 2.2.2)

(如準招募未及於面試前 3 日提交以下所有文件，面試安排將不會被確認)

• 香港身份證 (非香港永久性居民可以護照代替)
• 學歷/專業資格證明
• 履歷表
• 過往 12 個月入息證明</td>
<td>圖 2.2.1


圖 2.2.2

</td>
</tr>
</table>

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3. <u>第三步: 為準招募提交實體面試申請</u>

3.1 於友招募(iRecruit)的頂部導航欄點擊「4- 面試」(如圖 3.1)

圖 3.1



3.2 點擊「實體面試」及點選合適面試時段，再按「確定」(如圖 3.2.1 及圖 3.2.2)

圖 3.2.1

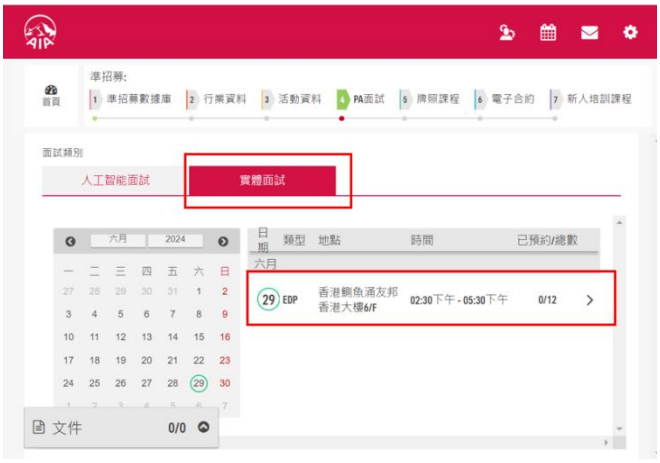

圖 3.2.2



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3.3 成功提交實體面試申請，主管/招募者將看到面試總結(如圖 3.3.1)

注意! 內部同事將根據已提供的資料及文件以核實 AIAPA-EDP 的面試資格，並會以電郵形式確認準招募/主管/招募者面試安排(如圖 3.3.2 及圖 3.3.3)

圖 3.3.1



圖 3.3.2- 準招募版本

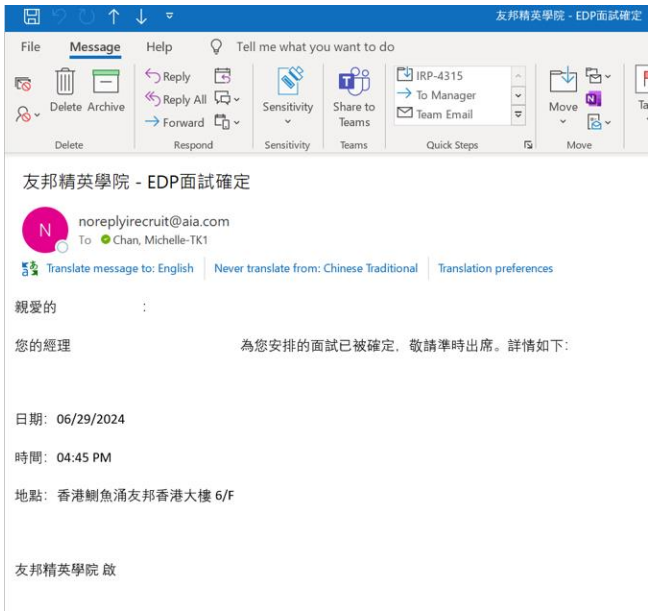
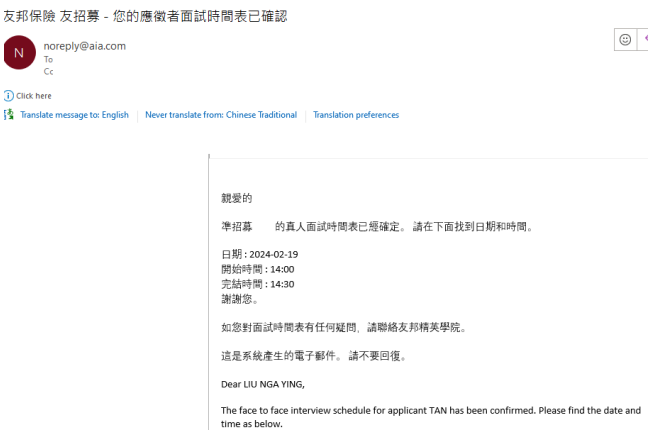


圖 3.3.3- 主管/招募者版本



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4. **<u>第四步: 準招募完成面試</u>** 準招募及主管/招募者於約定時間及地點完成面試，面試結果將於同日於友招募(iRecruit)的「4- 面試」-實體面試頁面上更新	

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Developing premier agencies has always been our business strategy. Using artificial intelligence and big data, Career Aptitude Test (CAT) and AI Interview has been very useful in assisting recruiters identify suitable candidates, applying LOU，and managing agencies. In view of this, starting from May 18, 2024, CAT and AI Interview will be compulsory for all newly contracted financial planners:

1. All financial planners with career representative effective date of June 1, 2024 or later are required to complete Career Aptitude Test (CAT) and AI Interview or equivalent interview，a new agent code will only be given out after the above requirement is fulfilled.
2. Detail as below：

Table 1：Career Aptitude Test and AI Interview requirement

(All financial planners with career representative effective date of June 1, 2024 or later)

<table>
<tr><td colspan="2">Contract Type</td><td>Internship</td><td>Financial Planner</td><td>AIAPA</td><td>AIAPA-EDP</td></tr>
<tr><td colspan="2">Career Aptitude Test (CAT) requirement</td><td colspan="4">Compulsory</td></tr>
<tr><td rowspan="6">AI Interview and face-to-face interview requirement</td><td>Not applying for LOU package</td><td colspan="2">AI Interview – FP</td><td>AI Interview - AIAPA</td><td rowspan="3">EDP Panel Interview</td></tr>
<tr><td>Applying for High Fly2 or PA18 MB2/FP12 MB2 (HK$15,000 MB or below）</td><td>Not Applicable</td><td>AI Interview – FP</td><td>AI Interview - AIAPA</td></tr>
<tr><td>PA18 MB2/FP12 MB2 (HK$16,000 MBor above)</td><td>Not Applicable</td><td rowspan="2">ABDD interview</td><td rowspan="2">AI Interview – AIAPA
and
ABDD Interview</td></tr>
<tr><td>Applying for TTFS</td><td>Not Applicable</td><td rowspan="2">EDP Panel Interview
and
ABDD Interview</td></tr>
<tr><td>Applying for EDP Elite</td><td>Not Applicable</td><td>Not Applicable</td><td>Not Applicable</td></tr>
<tr><td>Applying for STAR LOU,BANK LOU, or STAR-Lite</td><td>Not Applicable</td><td>ABDD Interview</td><td>Not Applicable</td><td>Not Applicable</td></tr>
<tr><td colspan="2">Additional document</td><td colspan="4">If the applicant is unable to pass AI Interview or face-to-face interview, ABDD and PAD can further request the applicant to provide additional documents：
3. Project 100 and/or
4. Marketing Plan</td></tr>
</table>

Additional information：

Appendix 1: 3 easy steps for completing Career Aptitude Test (CAT)
Appendix 2: 4 easy steps for completing AI Interview
Appendix 3: 4 easy steps for completing AIAPA-EDP Panel Interview

For any enquiries, please contact Premier Agency Development Department (Email: aiahk.premieragency@aia.com)

Premier Agency Development Department

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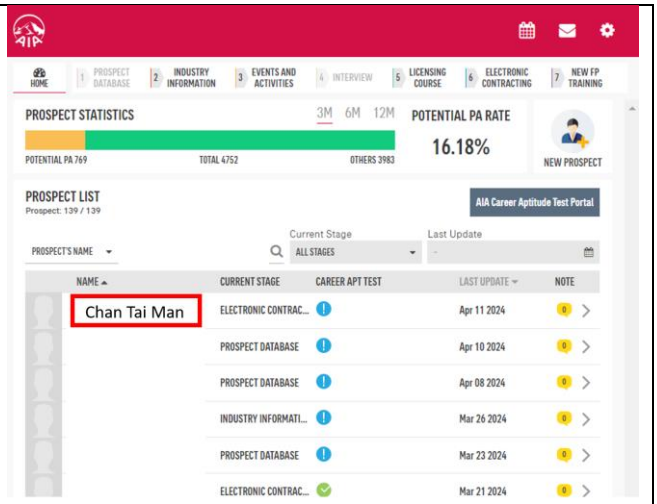
Appendix 1: 3 easy steps for completing Career Aptitude Test (CAT)

1. <u>Step 1: Create and select prospect's profile</u>

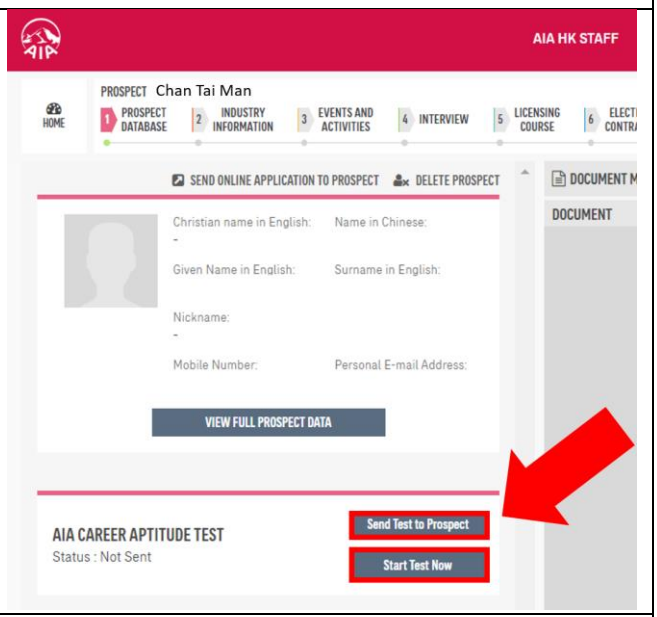
Select prospect's name from the prospect list at the home page of iRecruit



2. <u>Step 2: Send Career Aptitude Test (CAT) to prospect</u>

Send Test to Prospect – Leader/recruiter can select (Send Test to Prospect) to send the CAT hyperlink to prospect's email

Start Test Now – Leader/recruiter can select (Start Test Now) in order to begin the CAT straightaway



3. <u>Step 3: Prospect completing the Career Aptitude Test (CAT)</u>

If leader/recruiter selects (Send Test to Prospect), prospect will receive an email with a hyperlink for the Career Aptitude Test (See Pic 3.1)，prospect can click into the hyperlink, a One Time Password will be sent to prospect's phone no. in order to complete the 2 step verification. Once completed, prospect can proceed to the Career Aptitude Test.

If leader/recruiter selects (Start Test Now), prospect can proceed to the Career Aptitude Test straightaway. (See Pic 3.2)

Pic 3.1



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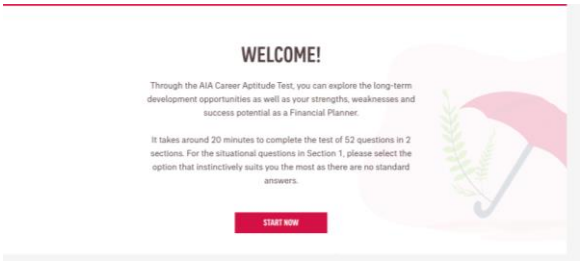
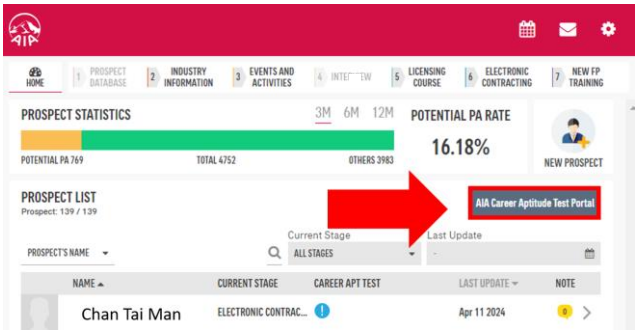
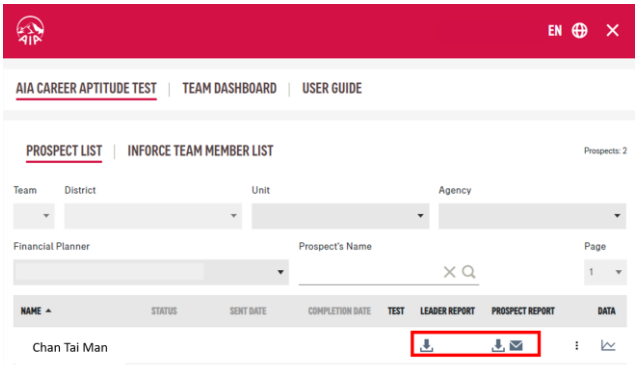
	Pic 3.2 
4. After prospect have completed the test, leader/recruiter will receive a system generated email	
5. If leader/recruiter wants to check the prospect's test result, leader/recruiter can use below one of the two methods, Method 1: Directly click on the hyperlink from the email (See Pic 4), the hyperlink is valid for 14 days. Method 2: • Proceed to iRecruit • Select (Career Aptitude Test Portal) (See Pic 5.1) • Click the icon (⬇) to download the leader/prospect version of the report (See Pic 5.2) <u>OR</u> • Click the email icon (✉) to email the prospect version of the report to prospect (See Pic 5.2)	Pic 5.1  Pic 5.2 

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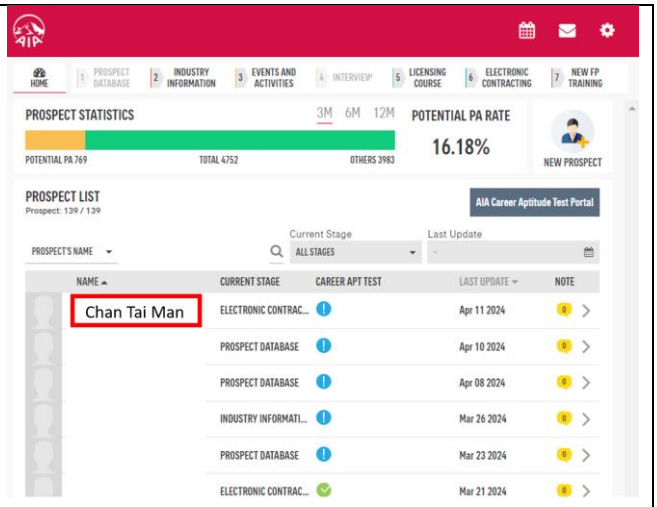
Appendix 2: 4 easy steps for completing AIA AI Interview

1. <u>Step 1: Create and select prospect's profile</u>

Select prospect's name from the prospect list at the home page of iRecruit

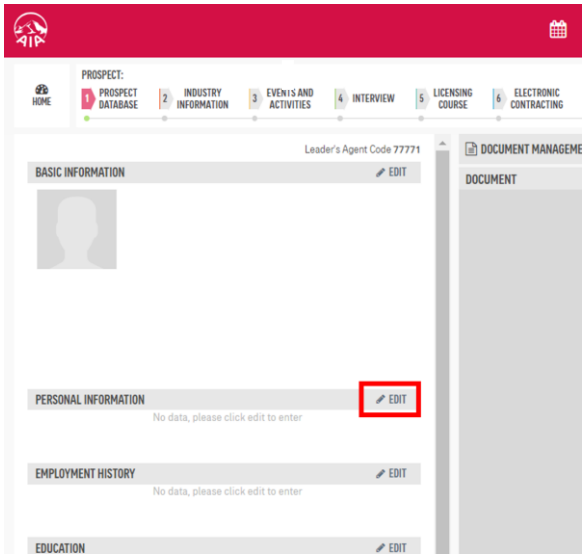


2. <u>Step 2: Enter required information and upload required documents</u>

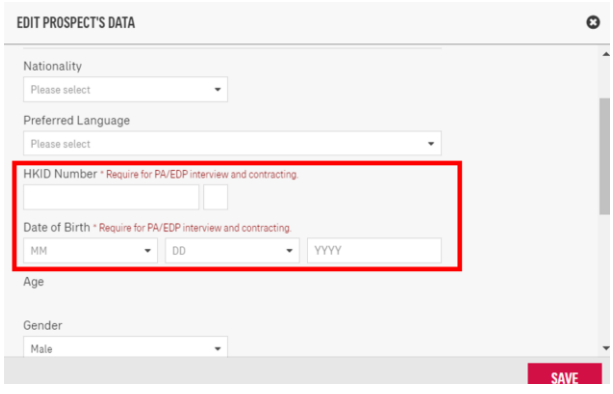
a. Before scheduling for interview, please provide the following information

- Please enter the HKID Number and Date of Birth in the **Personal Information** section in the prospect's profile. (See Pic 2.1.1 and Pic 2.1.2)
- (For AIAPA) Please enter the Year(s) of Experience in the **Employment History** section in the prospect's profile. (See Pic 2.1.3)
- (For AIAPA) Please enter the related academic background in the **Education** section in the prospect's profile. (See Pic 2.1.4)

Pic 2.1.1



Pic 2.1.2



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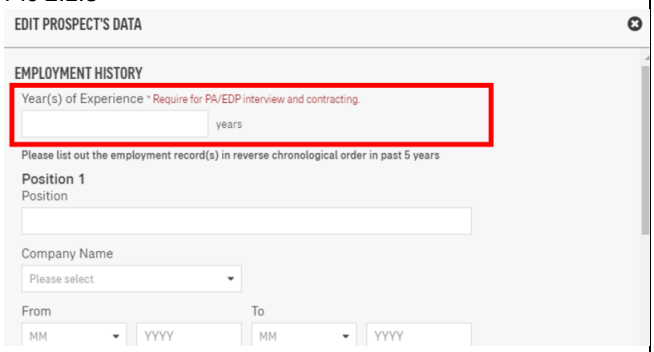
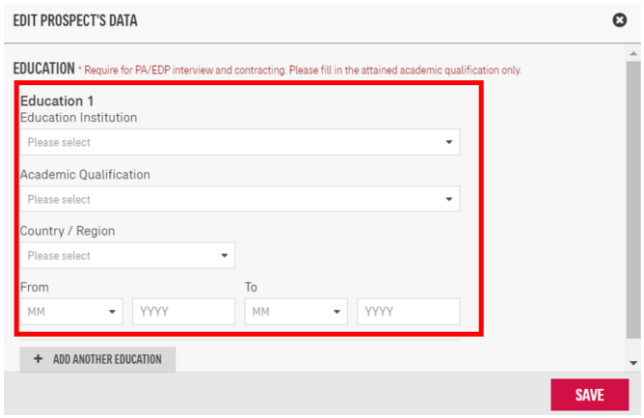
Pic 2.1.3



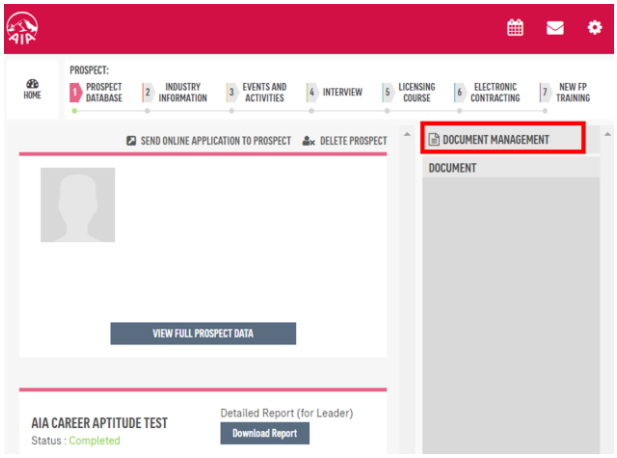
Pic 2.1.4



2.2 – **Before scheduling for AIAPA/FP interview, please upload the following document in the Document Management section (See Pic 2.2.1 and 2.2.2)**

- Hong Kong ID card (Non-permanent HKID holder can upload passport or Permit for Travelling to and from Hong Kong and Macao instead)
- Academic certificate/Professional qualification
- CV

Pic 2.2.1



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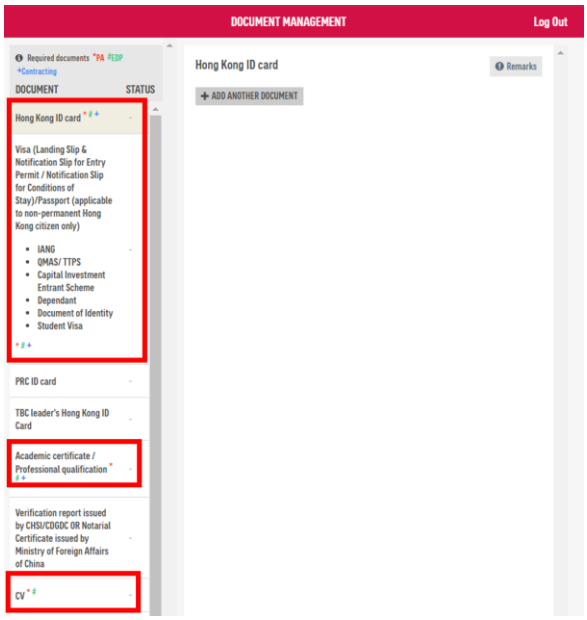
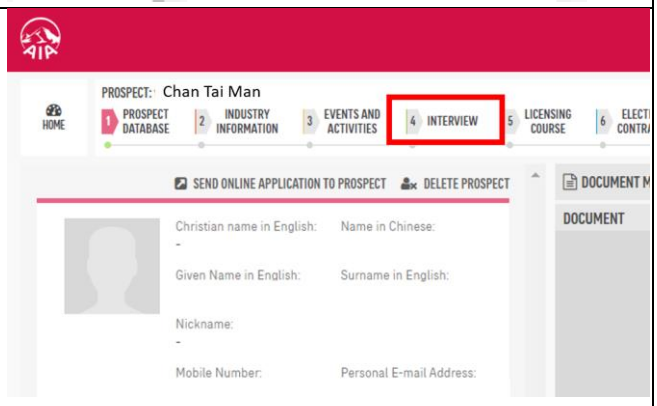
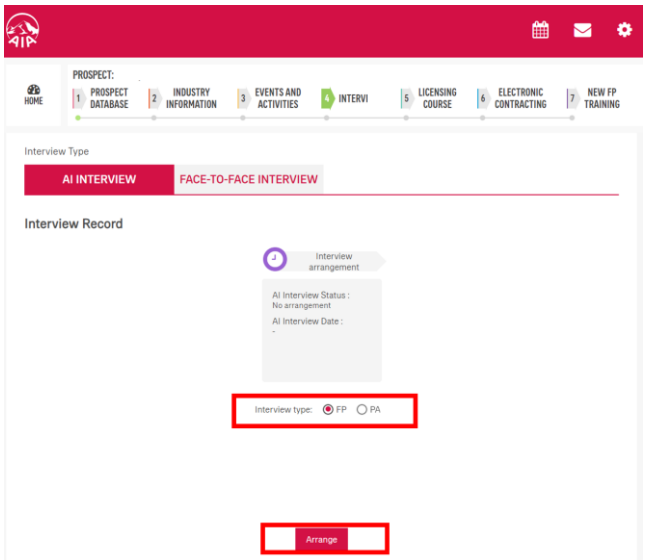
	Pic 2.2.2 
3. <u>Step 3: Schedule interview for prospect</u> Please select (4 – Interview) on the top navigation row in iRecruit	
4. Select the appropriate interview type for the prospect, then click (Arrange) **Reminder: If scheduling for AIAPA interview, please ensure prospect fulfill the following requirement** • Bachelor's degree or equivalent • Age 35 or under • 1 year or above work experience and do not have insurance company/IFA insurance sales experience	

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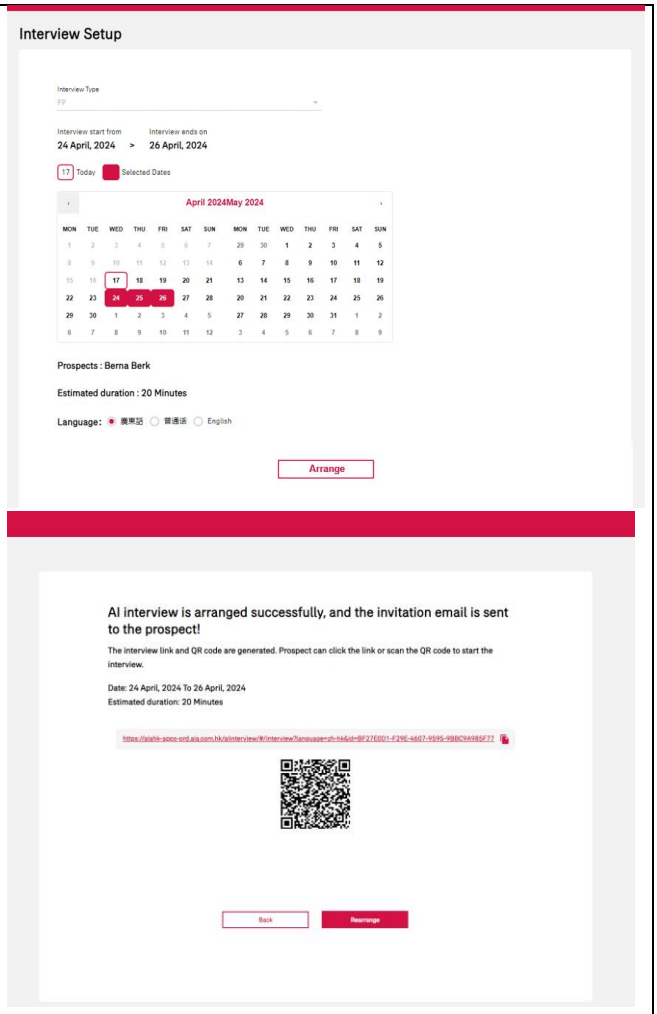
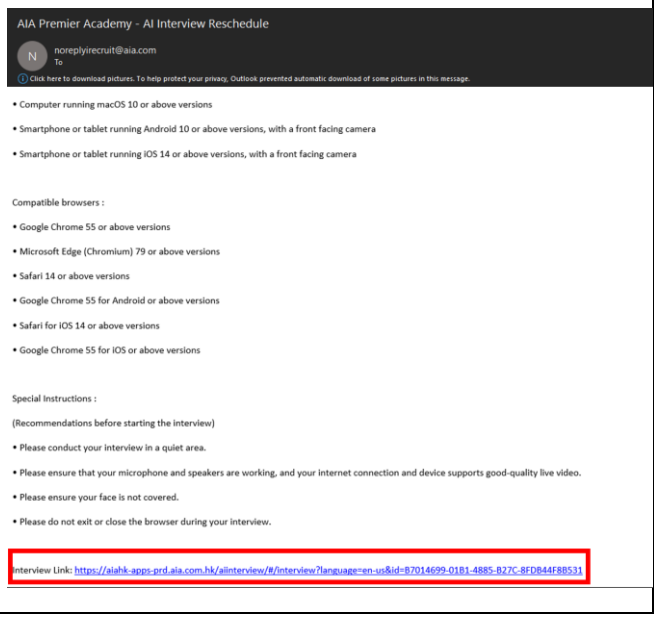
5. Select 3 interview dates and interview language (Prospect can complete the AI Interview in the selected dates), click (arrange)	
6. **<u>Step 4: Prospect complete AI Interview</u>** After leader/recruiter scheduled the interview, prospect will receive a system generated email with the interview hyperlink. Prospect can click on the interview hyperlink to begin the AI Interview (Expect duration: 20 mins approximately). After completing the AI Interview, leader/recruiter will receive a system generated email notification.	

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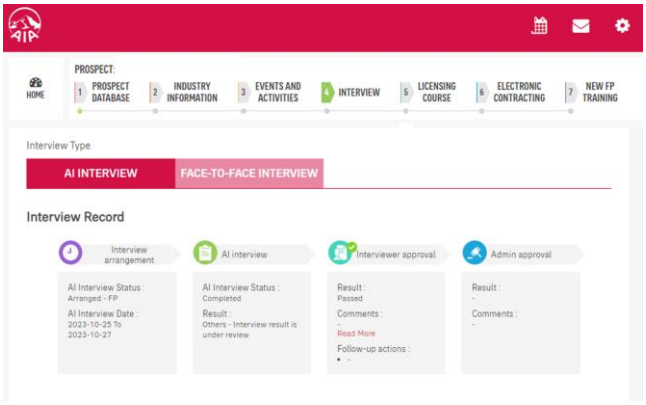
7. If leader/recruiter wants to check the AI Interview result, leader/recruiter can select (4 – Interview) on the top navigation row in iRecruit (See Pic 7.1) Below interview status represent the passing of AI Interview (See Pic 7.2) • The AI Interview Status shows (Completed), and the result shows (Passed). • The AI Interview Status shows (Completed) and the result shows (Others – Interview result is under review), and the Interviewer Approval result shows (Passed) (May take 1-2 business day) (See Pic 7.2)	Pic 7.1  Pic 7.2 

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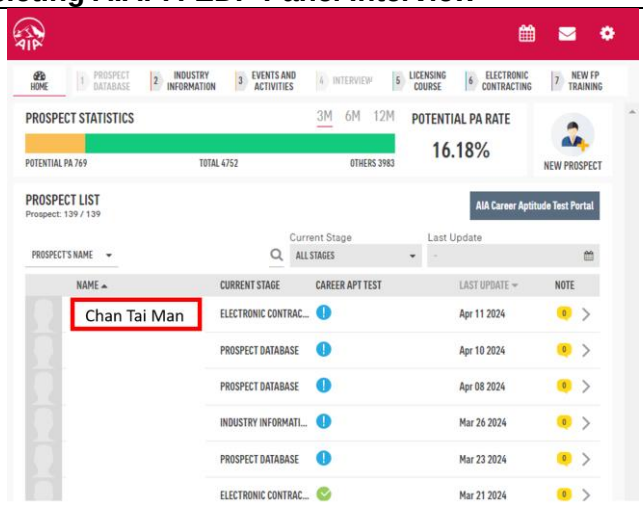
Appendix 3: 4 easy steps for completing AIAPA-EDP Panel Interview

1. <u>Step 1: Create and select prospect's profile</u>

Select prospect's name from the prospect list at the home page of iRecruit

Reminder: If scheduling for AIAPA-EDP interview, please ensure prospect fulfill the following requirement

- Bachelor's degree or equivalent
- Age 45 or under and
- 5 Years or above and do not have insurance company/IFA insurance sales experience
- (Age 39 or under) Annual income not less than HKD$300,000
- (Age 45 or under) Annual income not less than HKD$500,000

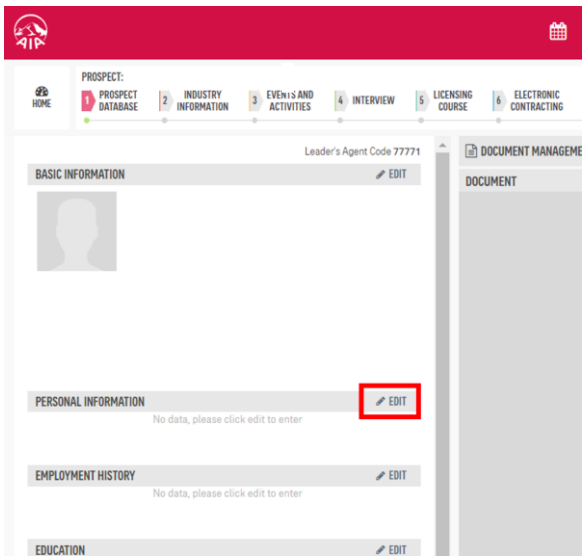


2. <u>Step 2: Enter required information and upload required documents</u>

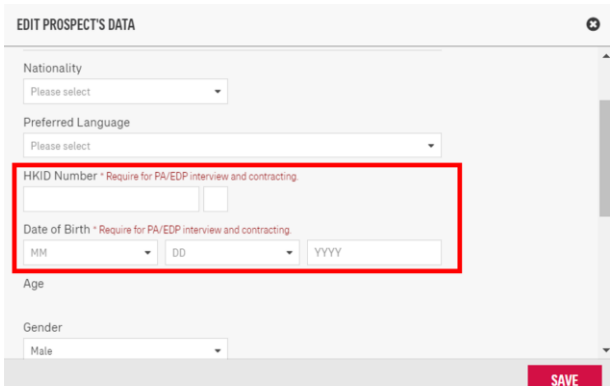
2.1- Before scheduling for interview, please provide the following information

- Please enter the HKID Number and Date of Birth in the **Personal Information** section in the prospect's profile. (As Pic 2.1.1 and Pic 2.1.2)
- Please enter the Year(s) of Experience in the **Employment History** section in the prospect's profile. (As Pic 2.1.3)
- Please enter the related academic background in the **Education** section in the prospect's profile. (As Pic 2.1.4)
- Please enter current annual income in the **Other Information** section in the prospect's profile. (As Pic 2.1.5 and Pic 2.1.6)

Pic 2.1.1



Pic 2.1.2



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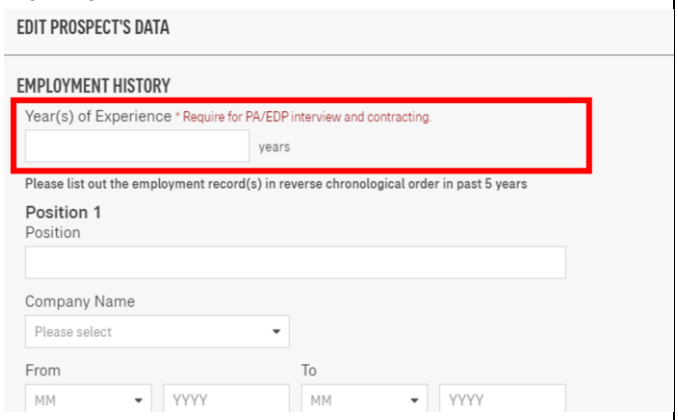
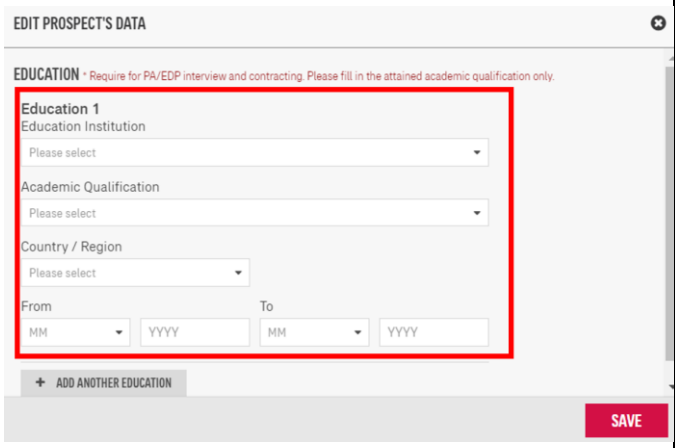
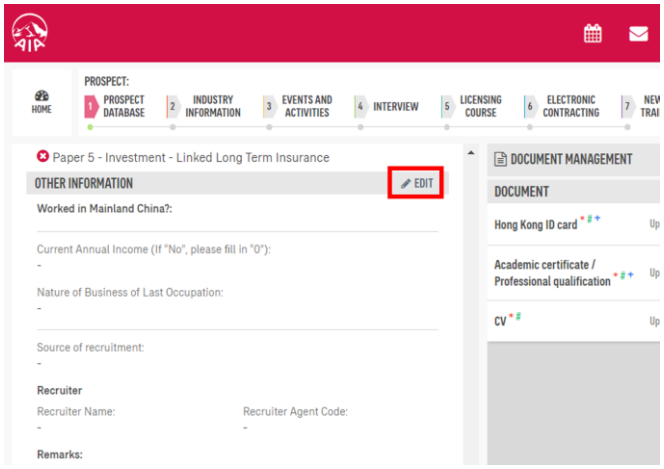
Pic 2.1.3



Pic 2.1.4



Pic 2.1.5



Pic 2.1.6



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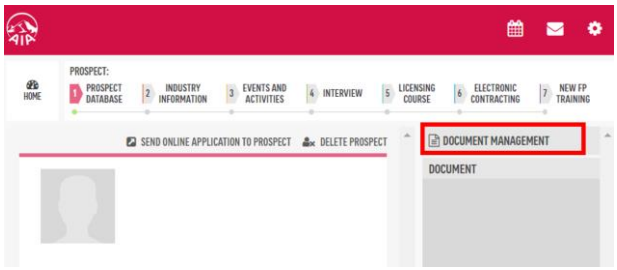
a. – Before scheduling for AIAPA-EDP interview, please upload the following document in the Document Management section (As Pic 2.2.1 and 2.2.2)

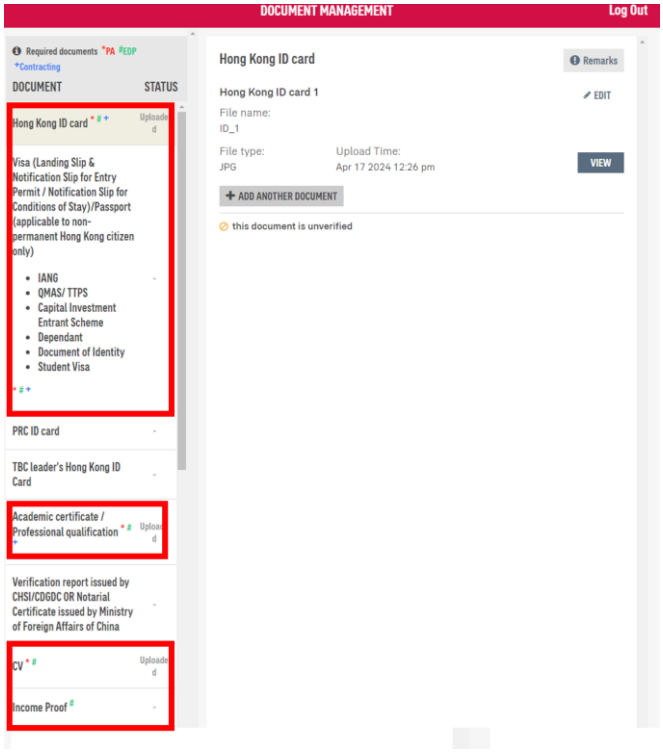
(If prospect failed to upload the following documents 3 days before interview, interview will not be confirmed)

- Hong Kong ID card (Non-permanent HKID holder can upload passport or Permit for Travelling to and from Hong Kong and Macao instead)
- Academic certificate/Professional qualification
- CV
- Past 12 months income proof

Pic 2.2.1



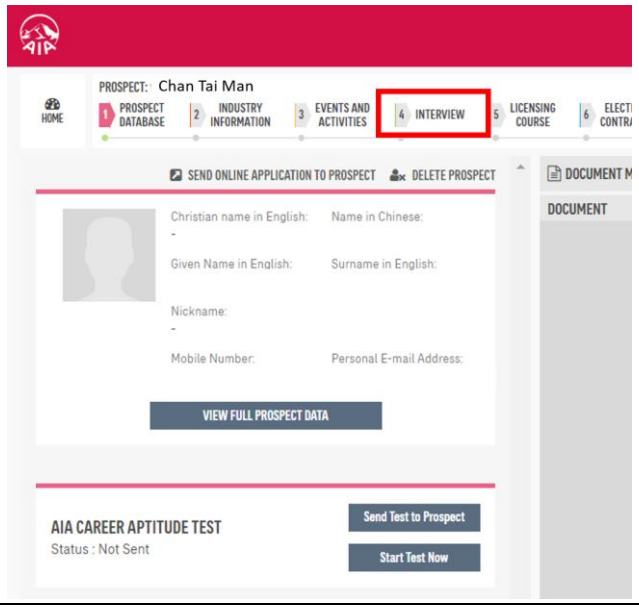
Pic 2.2.2



3. <u>Step 3: Schedule interview for prospect</u>

3.1 Please select (4 – Interview) on the top navigation row in iRecruit (See Pic 3.1)

Pic 3.1



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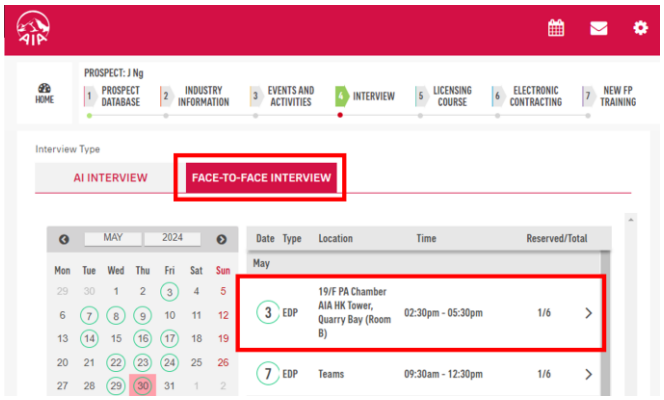
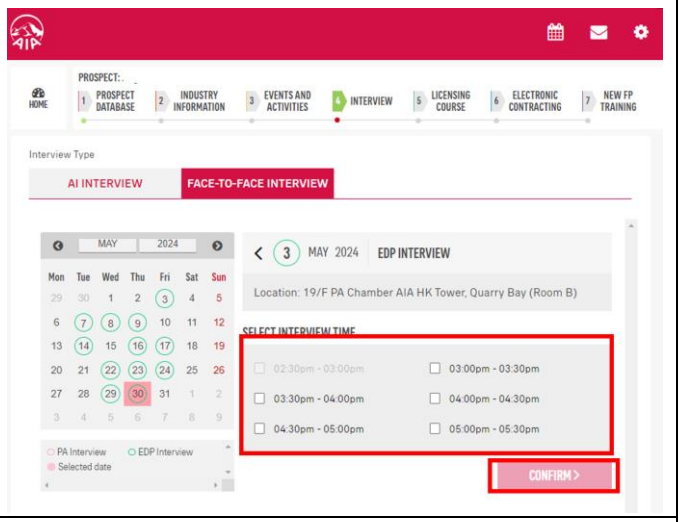
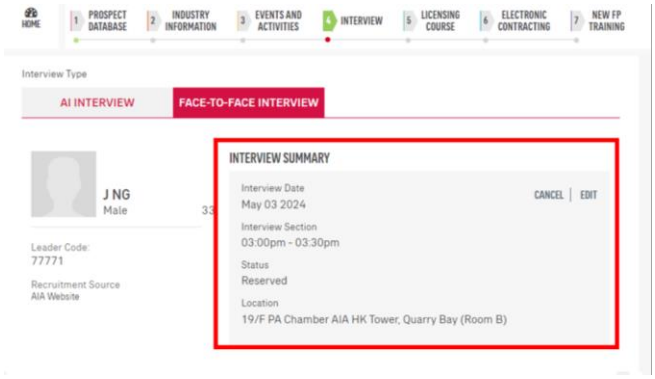
Memo

3.2 Select (Face-To-Face Interview) and select suitable time slot, then press (Confirm) (See Pic 3.2.1 and Pic 3.2.2)	Pic 3.2.1  Pic 3.2.2 
3.3 After successful scheduling Face-To-Face Interview, leader/recruiter will be able to see the interview summary (See Pic 3.3.1) Attention! Internal staff will determine qualification of AIAPA-EDP interview based on the provided information and documents. Internal staff will provide an email confirmation to prospect/leader/recruiter at a later time (See Pic 3.3.2)	Pic 3.3.1 

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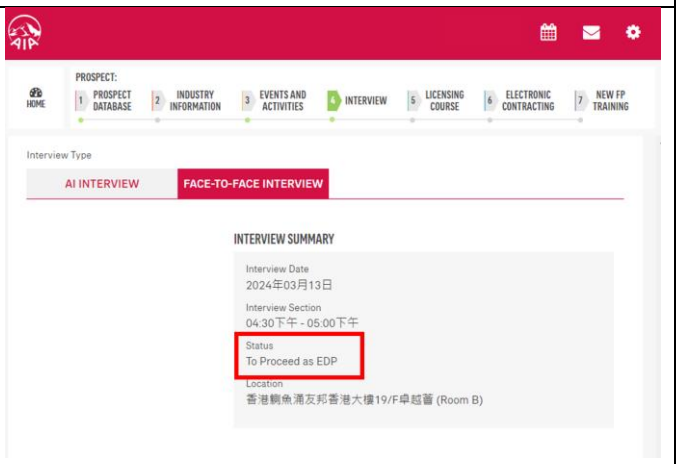
<table>
<tr>
<td></td>
<td>Pic 3.3.2- leader/recruiter version
友邦保險 友招募 - 您的應徵者面試時間表已確認
N noreply@aia.com
To
Cc
Click here
Translate message to: English | Never translate from: Chinese Traditional | Translation preferences
親愛的
準招募　　的真人面試時間表已經確定。請在下面找到日期和時間。
日期 : 2024-02-19
開始時間 : 14:00
完結時間 : 14:30
謝謝您。
如您對面試時間表有任何疑問，請聯絡友邦精英學院。
這是系統產生的電子郵件。請不要回復。
Dear LIU NGA YING,
The face to face interview schedule for applicant TAN has been confirmed. Please find the date and time as below.</td>
</tr>
<tr>
<td>4. <u>Step 4: Prospect completes interview</u>
Prospect and leader/recruiter attend the interview session in the selected time and location, the result of the interview will be updated on iRecruit (4 – Interview Section) in the same day</td>
<td>
</td>
</tr>
</table>

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