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2025 NSUM Appointment — e-Form User Guide

January 2025

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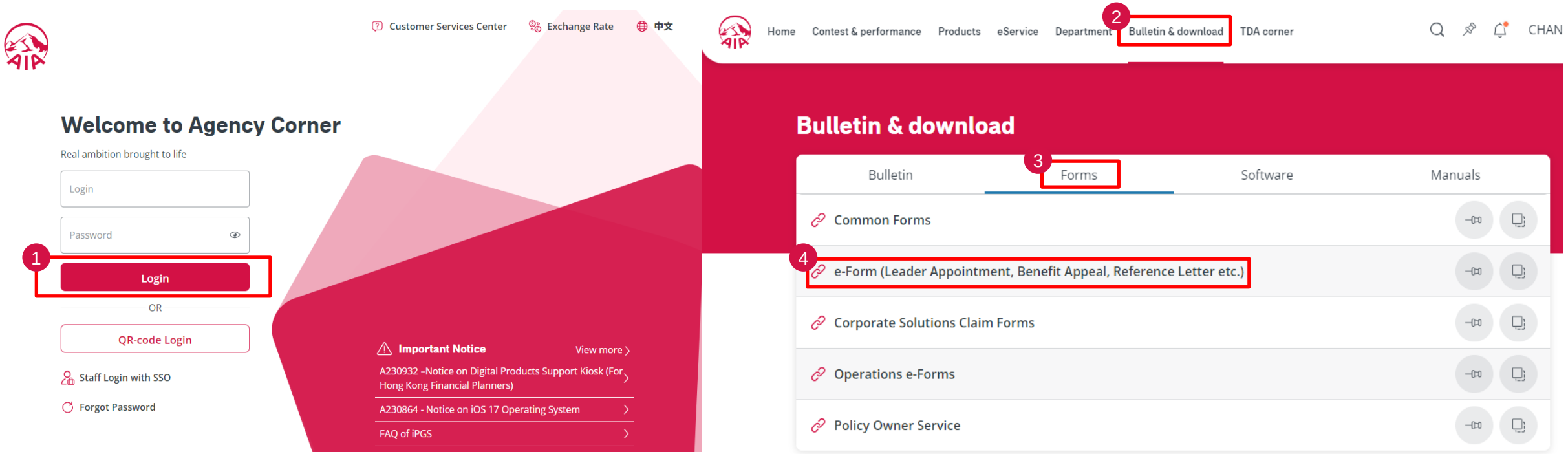
Submission of Appointment Application

Submission of Appointment Application

Step 1：Log into Agency Corner (eAC) https://aiahk-agency-prd.aia.com.hk/agency/login.do

Step 2-4：Bulletin & download → Forms → e-Form (Leader Appointment, Benefit Appeal, Reference Letter etc.)



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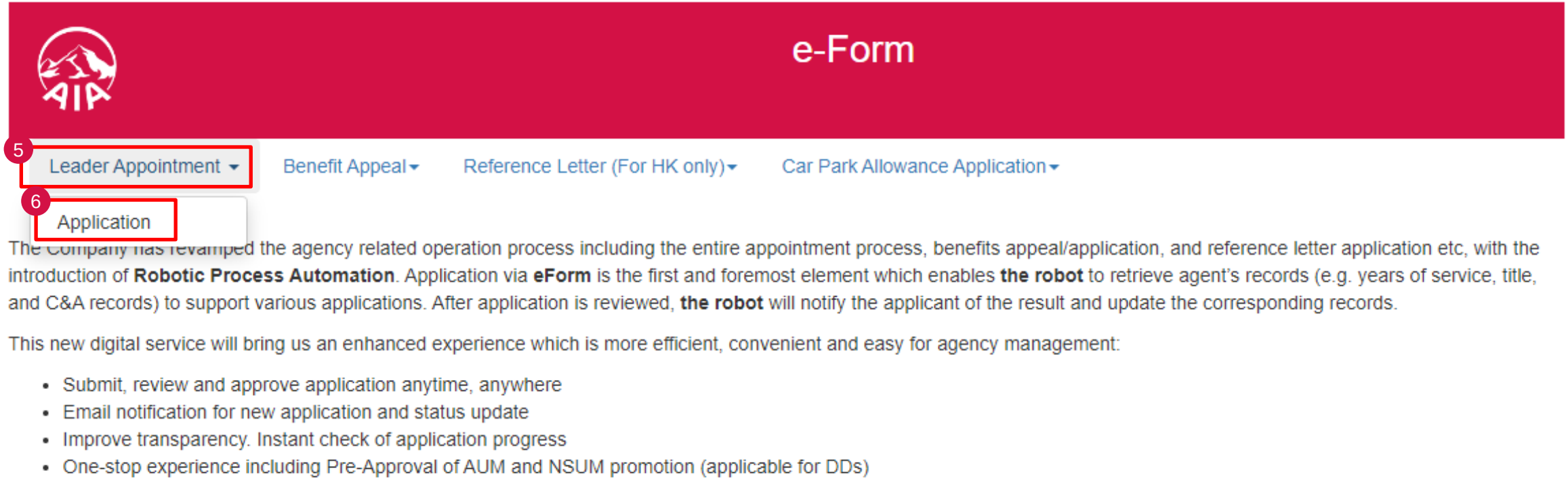
Submission of Appointment Application

Step 5-6：Click “Leader Appointment” and then “Application”



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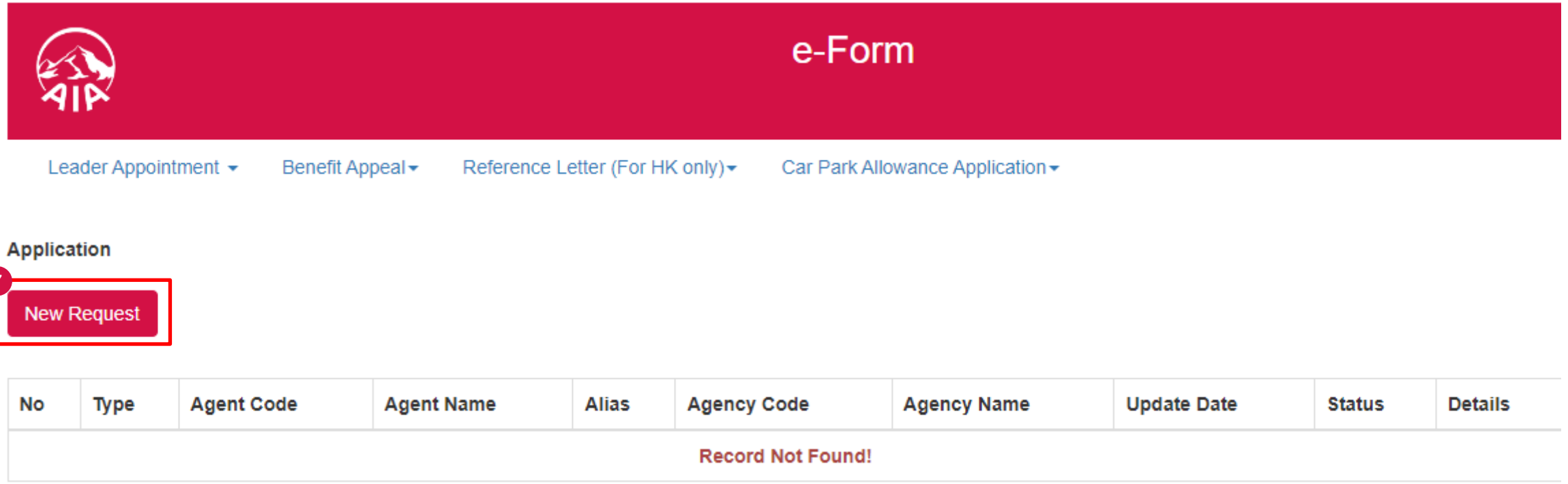
Submission of Appointment Application

Step 7：Click “New Request”



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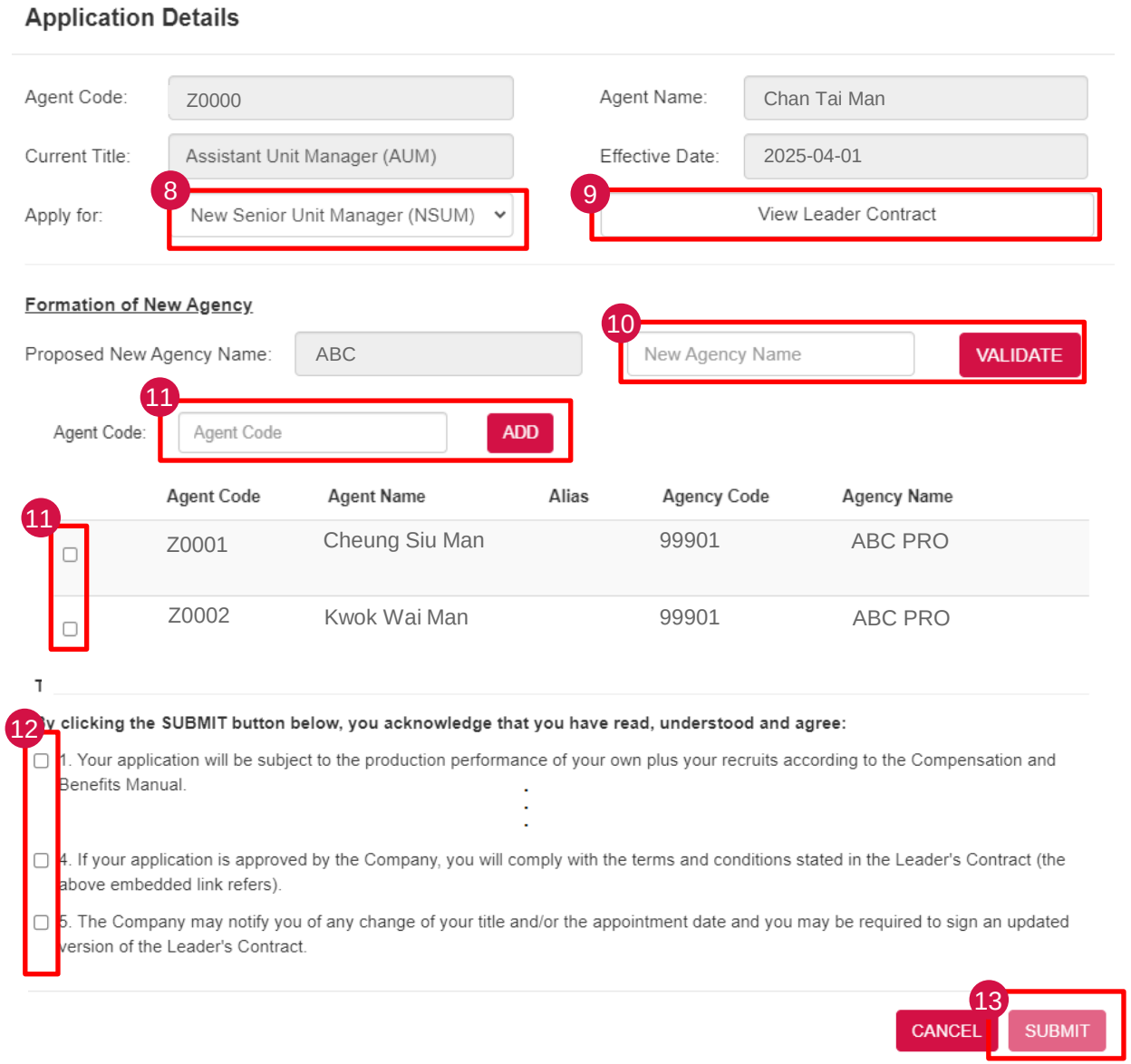
Submission of Appointment Application



Step 8：Select “Apply for” and choose “New Senior Unit Manager (NSUM)”

Step 9：Click “View Leader Contract” to read the contract

Step 10：Enter the “Proposed New Agency Name” and click “VALIDATE”
(used Agency Name / prohibited words will be excluded by system)

Step 11：System will automatically display recruits with proper records*. Applicant can choose/add financial planners to be transferred to new Agency

a. Must be under the same Agency as the applicant
b. Inforce financial planner
c. Recruited by:
   - The applicant；or
   - Downline Unit Manager (UM) / Assistant Unit Manager (AUM) of the applicant

Step 12：Read the “Terms and Conditions” and tick the boxes

Step 13：Click “SUBMIT”

*Submitted “Form For Financial Planner Recruited By AUM”; OR filled the “Recruiter Agent Code” in “Applicant info” Section in “Application For Financial Planner” website or iRecruit 2.0 (For Macau Only); OR filled the “Recruiter” field in Source of Recruitment Section in iRecruit at the time of contract application to record the relationship (For Hong Kong Only).

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Approval of Application by Direct Agency Leader and DD

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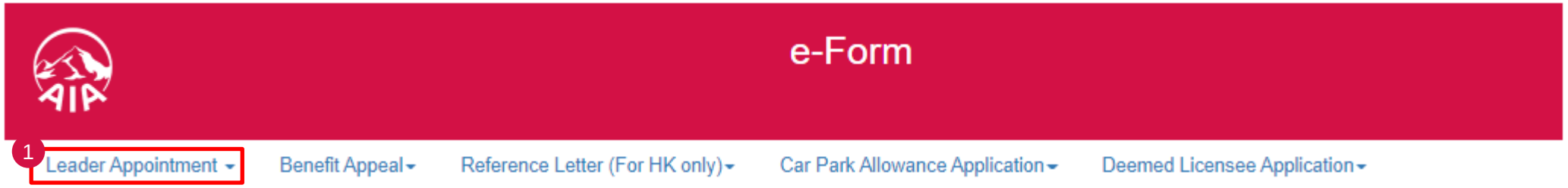
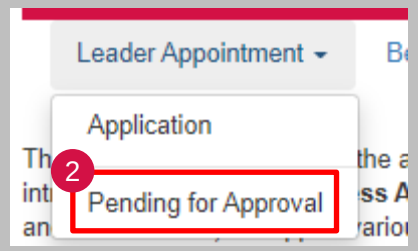
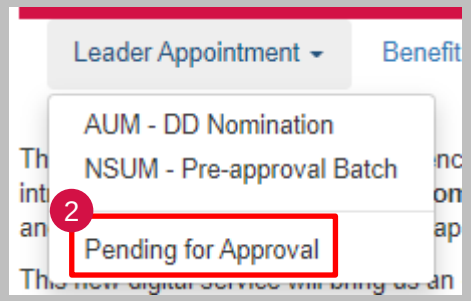
After the application is successfully submitted, the applicant, Direct Agency Leader and DD will receive an email notification

Step 1-2：Direct Agency Leader and DD click “Leader Appointment” and then “Pending for Approval”



Agency Leader Page	District Director (DD) Page
	

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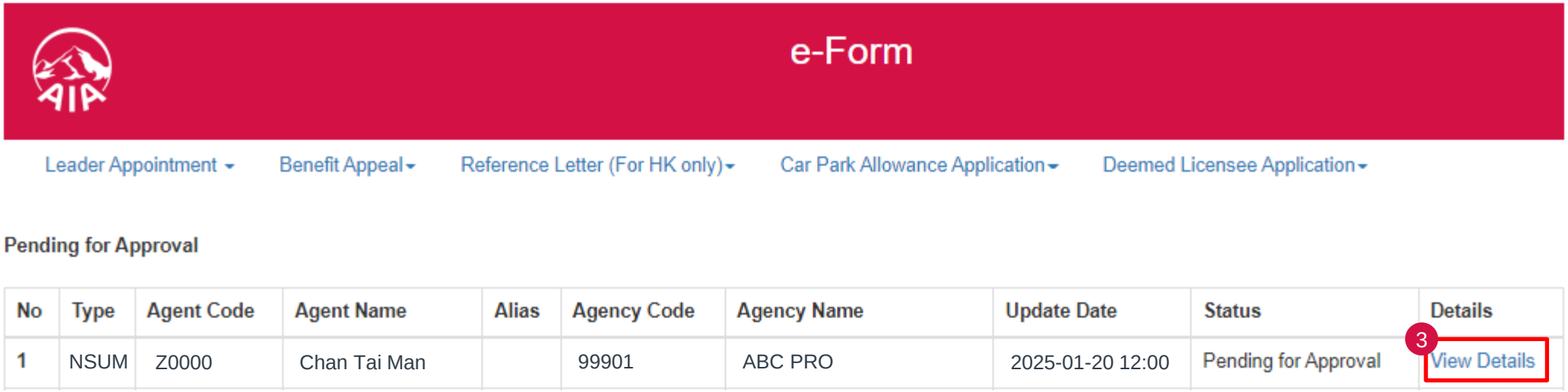
Approval of Application by Direct Agency Leader and DD

Step 3： Click “View Details”



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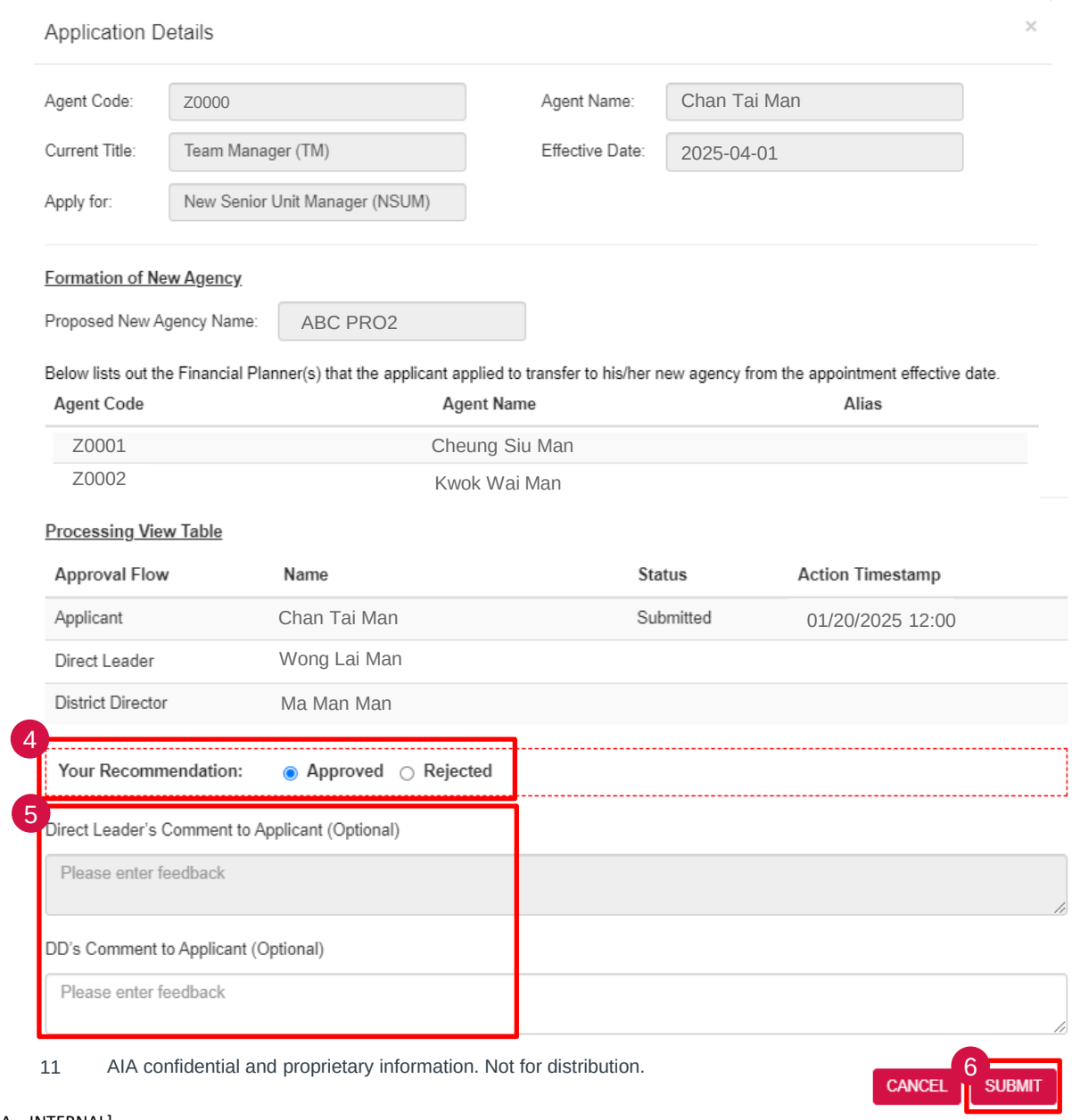
Approval of Application by Direct Agency Leader and DD



Step 4：Direct Agency Leader and DD can choose whether to “Approve” or “Reject” the application

Step 5：Direct Agency Leader and DD can optionally fill in Comment to the applicant

Step 6：Click “SUBMIT” after review

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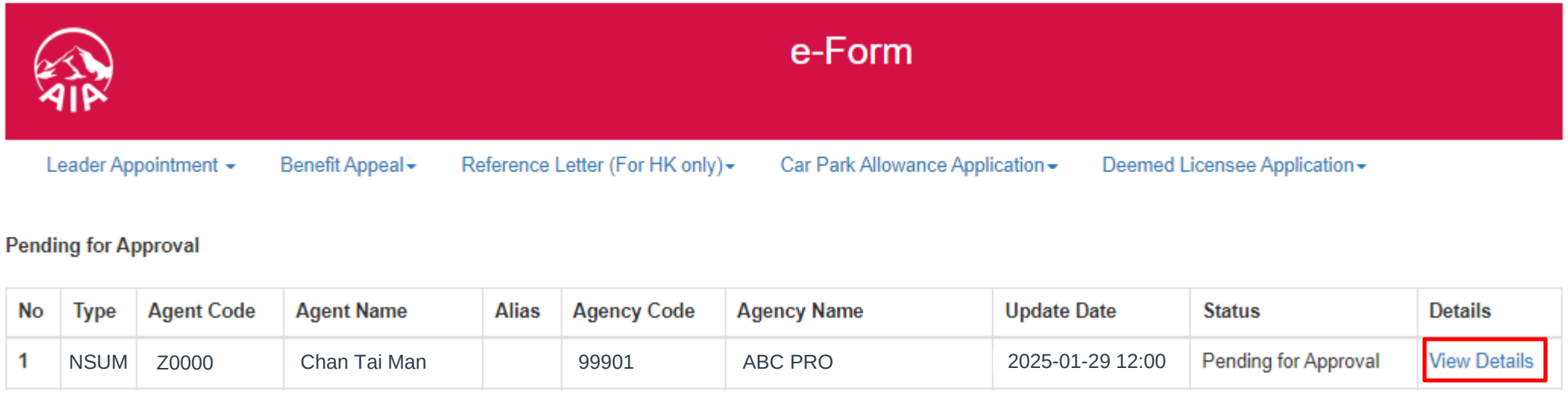
Application Progress Checking

Application Progress Checking

The application progress will be updated automatically. Applicant, Direct Agency Leader and DD can login to e-Form to check the status anytime.



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Thank you

