HEALTHIER, LONGER, BETTER LIVES

2024 NSUM / SUM Appointment — Microsoft Application Form User Guide

May 2024

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Submission of Appointment Application

NSUM/SUM Appointment Application Submission & Approval Flow

Applicant Eligibility: UM / AUM / FP
Application Period: 1 – 30 Jun 2024
Upline Agency Leader & DD Approval Deadline: 28 calendar days from submitted date to 7 Jul 2024 (whichever is earlier)

If DD is the direct agency leader,

Approval request will be sent directly to DD



Approval Deadline: 28 Calendar days from submitted date or until 7 Jul 2024 (whichever is earlier)

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Submission of Appointment Application

Step 1: Click on the link here or Memo **A240556**, the NSUM/SUM Appointment Application Form will be opened on the default browser.

1 The Appointment Effective Date for final successful promotion of this round of applicants will be on **1 Jul 2024**.



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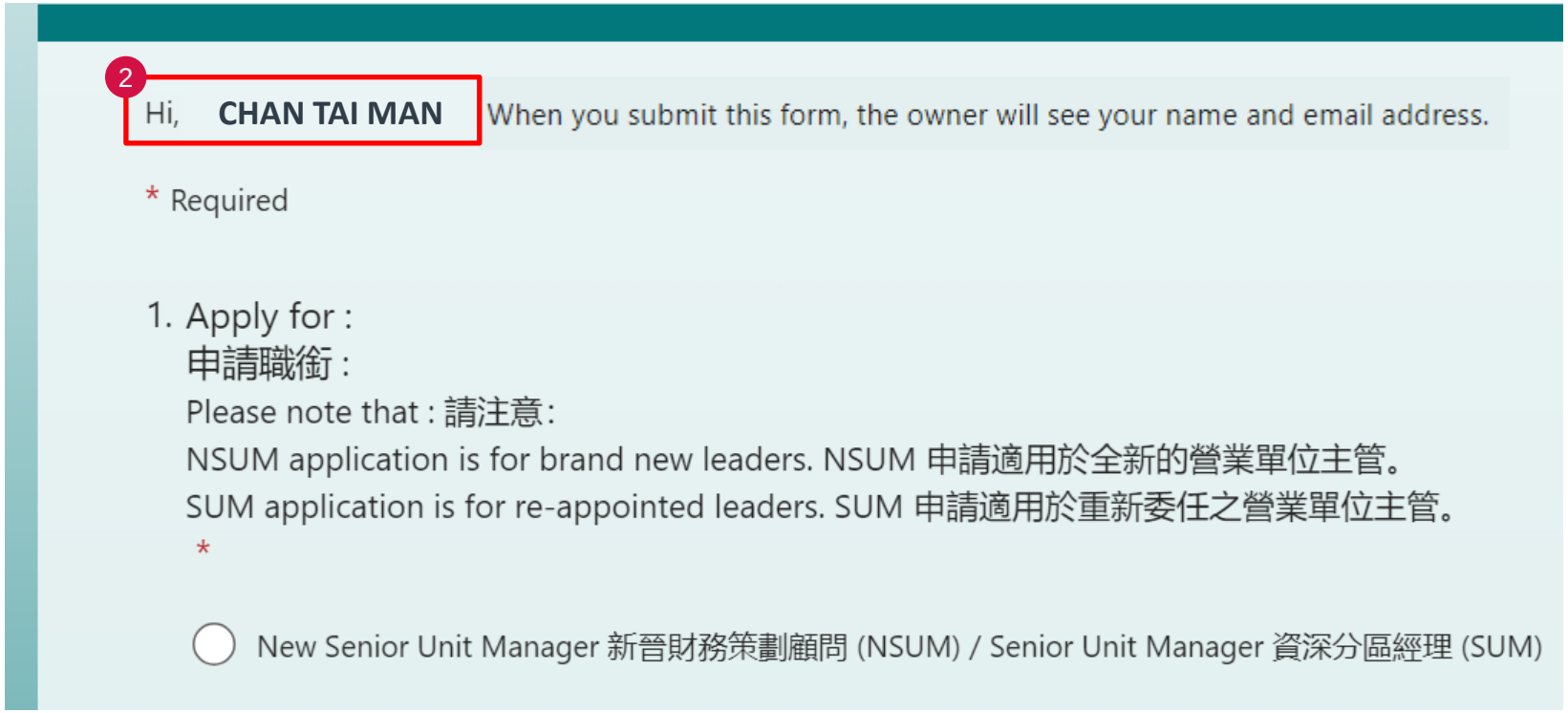
Submission of Appointment Application

Response to **ALL** the questions on the form marked with *
Step 2: Click on the button ○ to indicate the position applied, the button will then change to ◉ after clicking



2 The Applicant's name will be shown on the form

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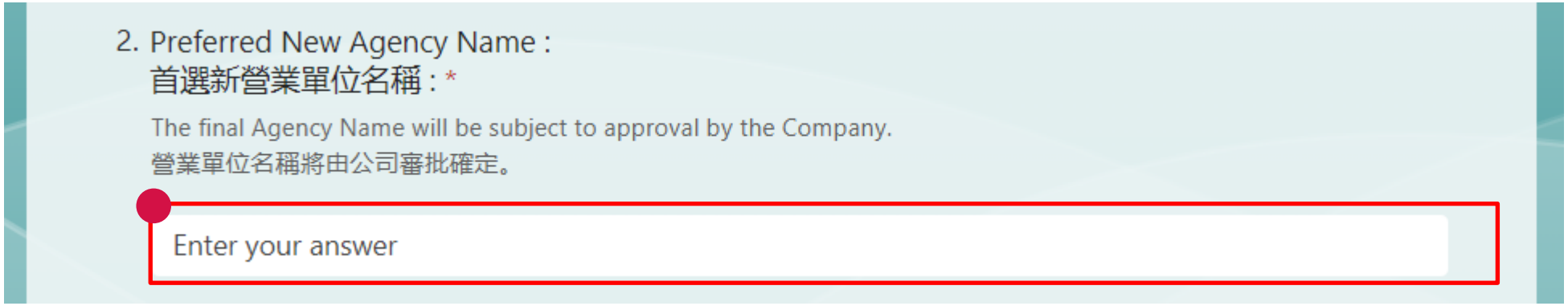
[AIA – INTERNAL]

Submission of Appointment Application

Step 3: Enter ONE name for the Preferred New Agency Name



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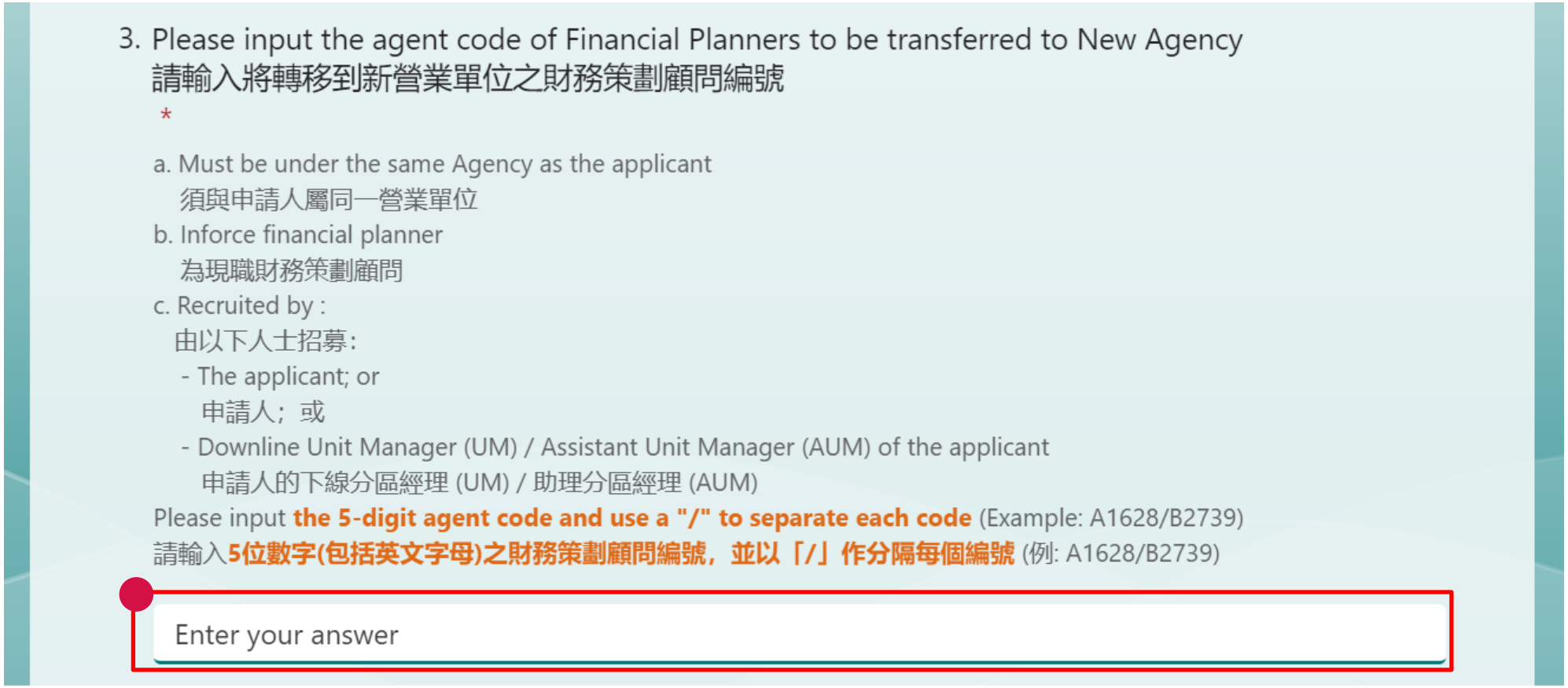
[AIA – INTERNAL]

Submission of Appointment Application

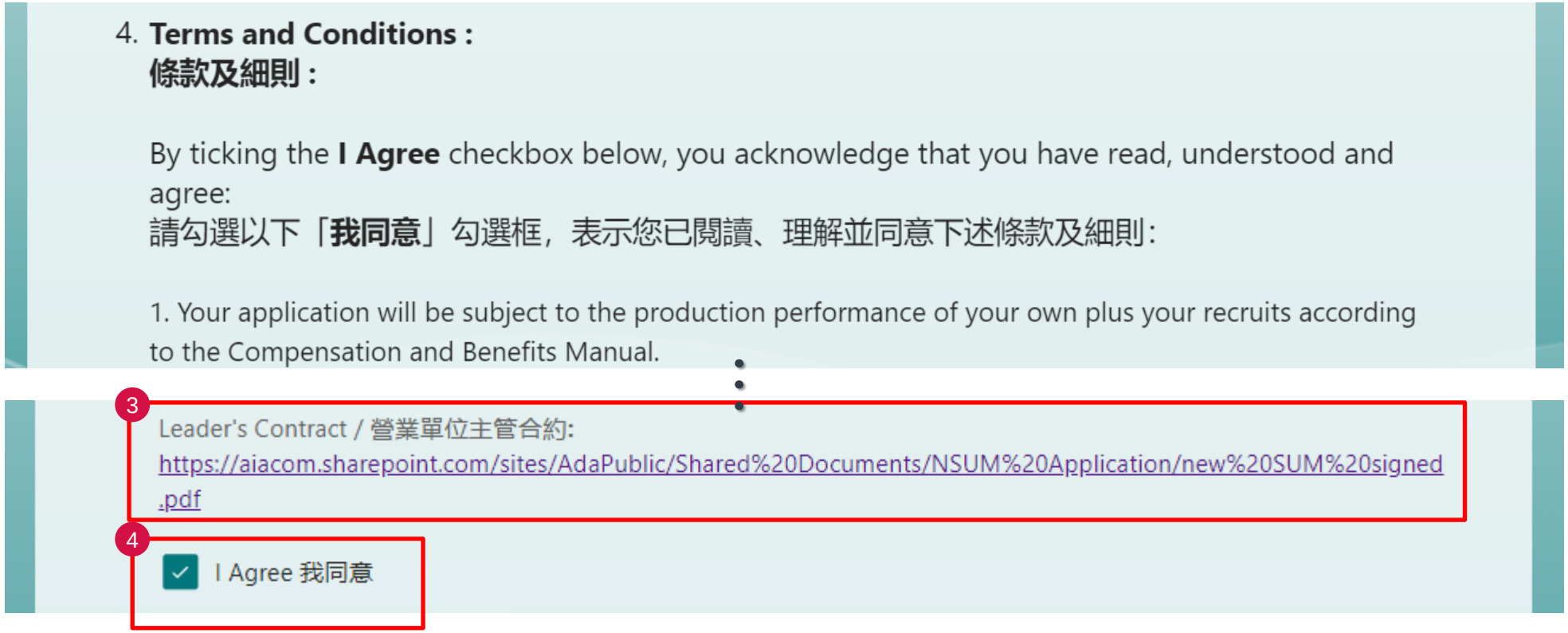
Step 4: Enter **the 5-digit agent code and use a "/" to separate each code** (Example: A1628/B2739) for the Financial Planners to be transferred to New Agency, which must fulfil the requirement (a), (b) & (c)



[AIA – INTERNAL]

Submission of Appointment Application

Step 5: Click the link to read ❸ the Leader's Contract
Step 6: Tick ❹ **I Agree** checkbox to acknowledge that you have read, understand and agree the Leader's Contract, the Terms and Conditions under Question 4



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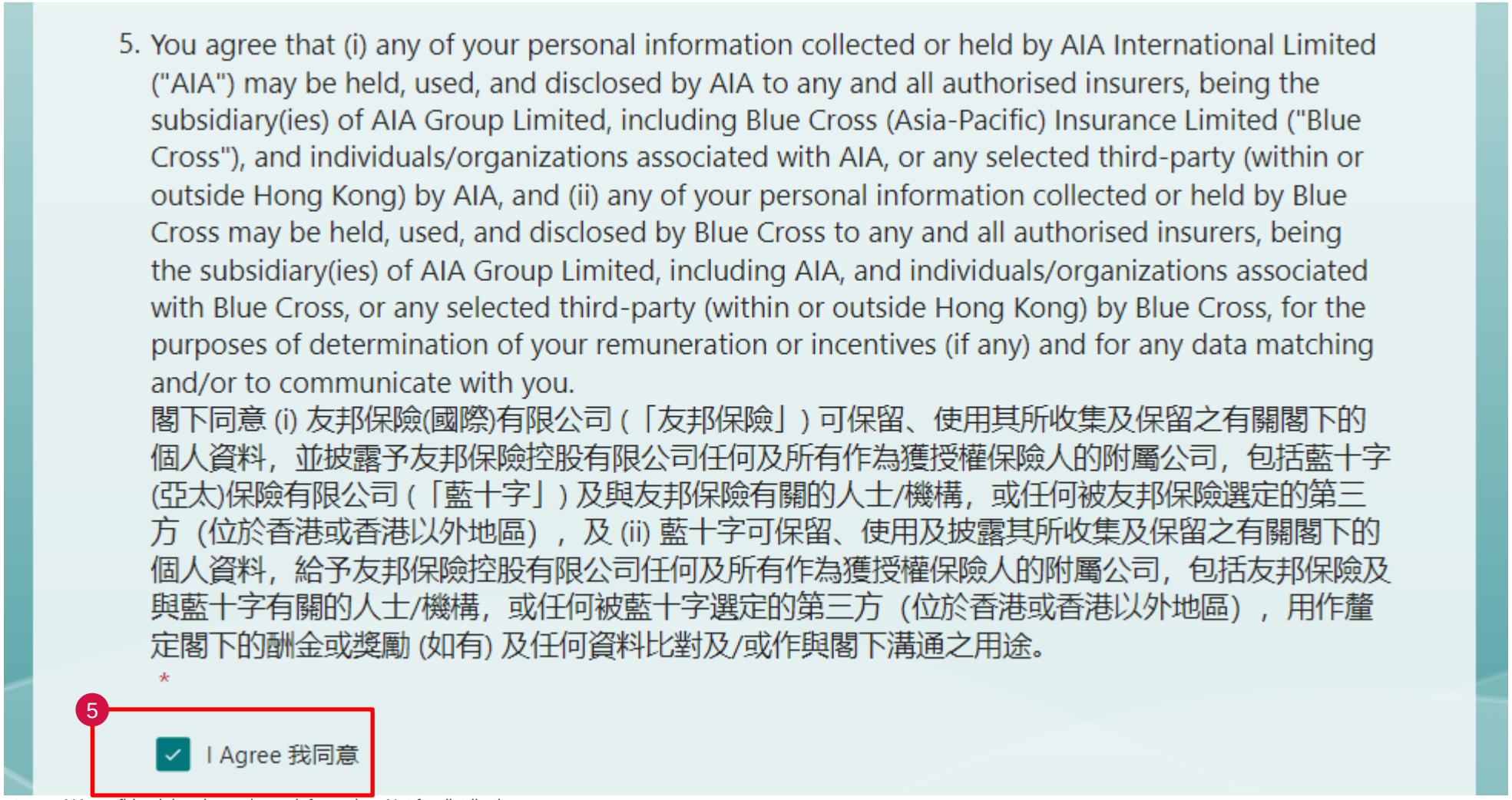
[AIA – INTERNAL]

Submission of Appointment Application

Step 7: Tick ❺ **I Agree** checkbox to acknowledge that you have read, understand and agree the Terms and Conditions under Question 5



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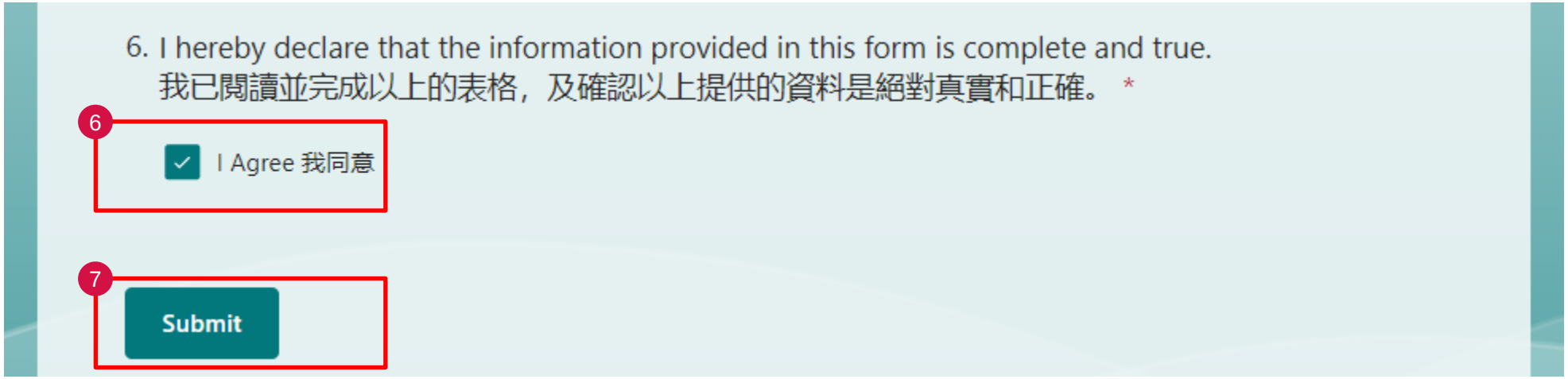
[AIA – INTERNAL]

Submission of Appointment Application

Step 8: Tick ❻ **I Agree** checkbox to declare that the information provided in this form is complete and true
Step 9: Click ❼ **Submit** button to submit the appointment application form



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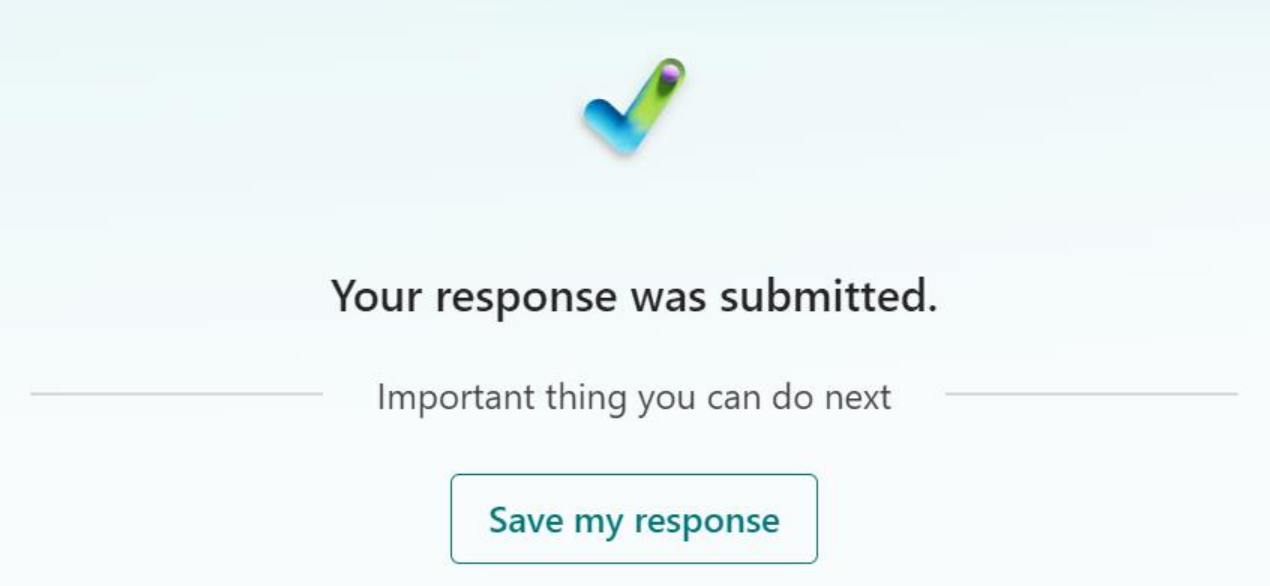
Submission of Appointment Application

The confirmation page will be shown after submission.



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Submission of Appointment Application

The Applicant will receive an acknowledgment of application via Email: **“Application for NSUM/SUM Appointment – Submitted”**

新晉資深分區經理/資深分區經理委任申請 - 已遞交 Application for NSUM/SUM Appointment – Submitted

aiahk.agency-digital-administration@aia.com
To CHAN TAI MAN

Reply | Reply All | Forward | ...
Thu 05/30/2024 4:50 PM

Translate message to: English | Never translate from: Chinese Traditional | Translation preferences

Your application for appointment has been submitted. The application is subject to the approval by your upline Agency Leader and/or District Director; and the production performance review and approval by the Company.

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
F2460	CHAN TAI MAN 2	Agency Name 2	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您已遞交委任申請。有關申請需經您的上線營業單位主管及／或區域總監批准；及公司就您業績表現作審批。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
F2460	陳大文 2	Agency Name 2	新晉資深分區經理（NSUM）／資深分區經理（SUM）	2024 年 07 月 01 日

如有查詢，請與您所屬的 Head of Agency Division 或 Agency Business Partner 聯絡。
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Approval of Appointment Application by Upline Agency Leader and DD

Approval Flow

Once application submitted, Agency Leader & DD will receive the application approval request by Email or MS Teams and need to respond within **28 Calendar days** from submitted date or until 7 Jul 2024 (whichever is earlier).

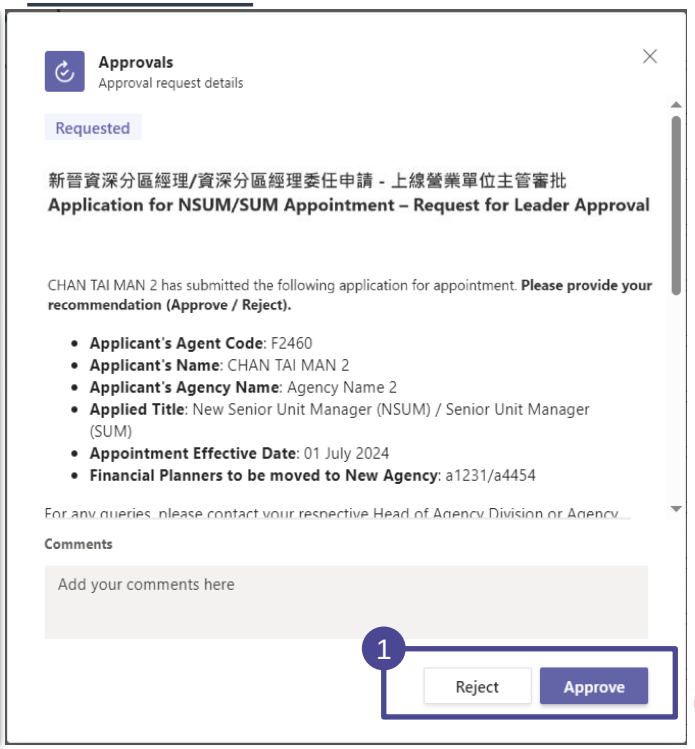
Application approval by **Upline Agency Leader**

1. Click the button **Approve / Reject** to provide the approval

Email



MS Teams



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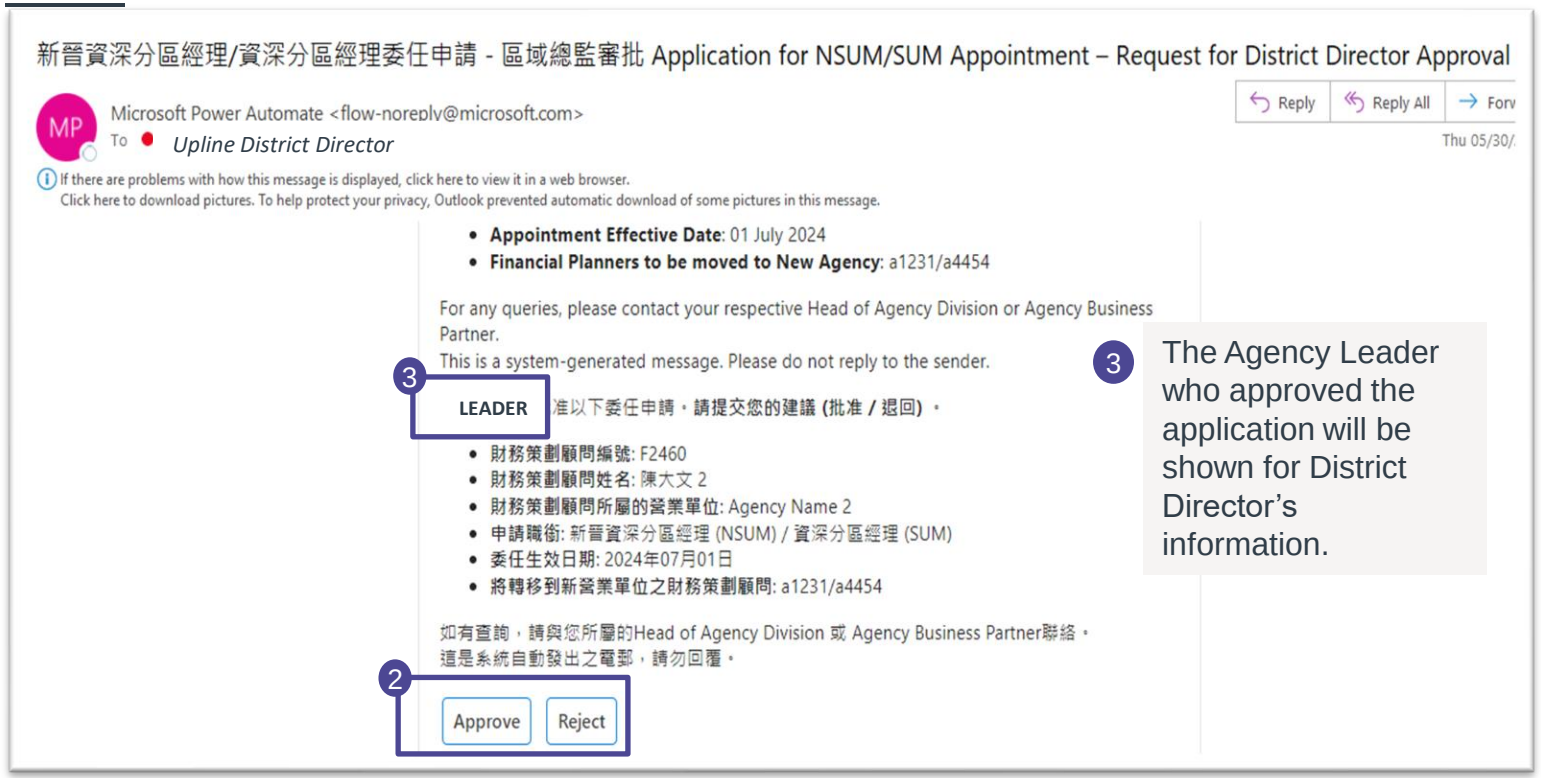
Application approval by **Upline District Director**

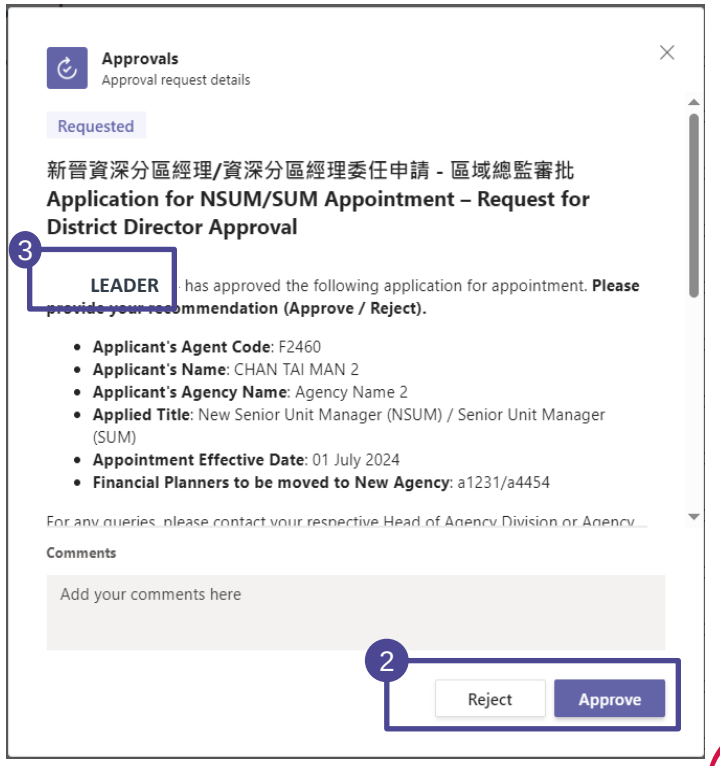
Once approved by Upline Agency Leader, the Upline DD will receive the application approval request by Email and MS Teams:
“Application for NSUM/SUM Appointment – Request for District Director Approval”.
2 Click the button **Approve / Reject** to provide the approval

Email



3 The Agency Leader who approved the application will be shown for District Director’s information.

MS Teams



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Application approval by Upline Agency Leader & DD

Reminder email will be sent to approver (Agency Leader / District Director) **every 3 days** if it is still pending for approval: **“[Approval Reminder] Application for NSUM/SUM Appointment”.**

[審批提示] 新晉資深分區經理/資深分區經理委任申請 [Approval Reminder] Application for NSUM/SUM Appointment

aiahk.agency-digital-administration@aia.com

To *Upline Leader / DD*

Reply | Reply All | Forward | ...

Thu 05/30/2024 4:59 PM

Translate message to: English | Never translate from: Chinese Traditional | Translation preferences

CHAN TAI MAN 2 has submitted the following application for appointment. **Please be reminded to provide your recommendation (Approve / Reject) as soon as possible**.

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
F2460	CHAN TAI MAN 2	Agency Name 2	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
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陳大文 2 已遞交以下委任申請。**請盡快提交您的建議（批准 / 退回）**。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
F2460	陳大文 2	Agency Name 2	新晉資深分區經理（NSUM）/ 資深分區經理（SUM）	01 July 2024

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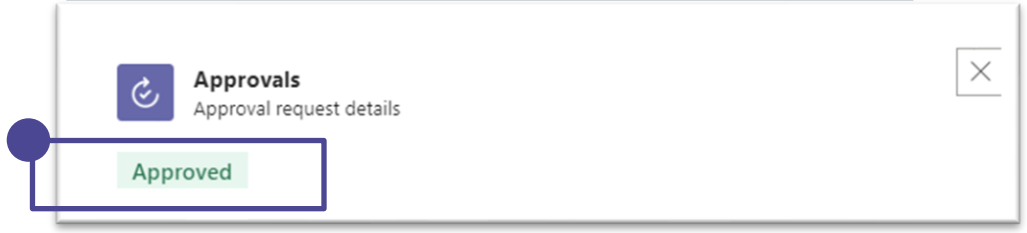
Application approval by Upline Agency Leader & DD

Once Agency Leader / District Director has responded to the application, the status shown on MS Teams will be changed from Requested to Approved / Rejected

Before approval



After approval: approved the application



After approval: rejected the application



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Update of Application Status

Update of Application Status

If the application is Approved, the Update Status of the application will be sent to the applicant via email **"Application for NSUM/SUM Appointment – Update of Status"**

新晉資深分區經理/資深分區經理委任申請 - 最新狀態 Application for NSUM/SUM Appointment – Update of Status

aiahk.agency-digital-administration@aia.com

To CHAN TAI MAN

Reply | Reply All | Forward | ...

Thu 05/30/2024 4:54 PM

Translate message to: English | Never translate from: Chinese Traditional | Translation preferences

Your application for appointment has been approved by your upline Agency Leader/District Director. The application is subject to the production performance review and approval by the Company.

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
F2460	CHAN TAI MAN 2	Agency Name 2	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您的委任申請已經上線營業單位主管及 / 或區域總監批准。公司將就您的業績表現審批有關申請。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
F2460	陳大文 2	Agency Name 2	新晉資深分區經理 (NSUM) / 資深分區經理 (SUM)	01 July 2024

如有查詢，請與您所屬的 Head of Agency Division 或 Agency Business Partner 聯絡。
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Update of Application Status

If the application is Rejected : The Update Status of the application will be sent to the applicant via email **"Application for NSUM/SUM Appointment – Update of Status"**

新晉資深分區經理/資深分區經理委任申請 - 最新狀態 Application for NSUM/SUM Appointment – Update of Status

aiahk.agency-digital-administration@aia.com

To CHAN TAI MAN

Reply | Reply All | Forward | ...

Thu 05/30/2024 5:09 PM

Translate message to: English | Never translate from: Chinese Traditional | Translation preferences

Your application has been returned by your upline Agency Leader/District Director, it won't be further proceed.

Applicant's Agent Code	Applicant's Name	Applicant's Agency Name	Applied Title	Appointment Effective Date
D0001	CHAN TAI MAN 17	Agency Name 17	New Senior Unit Manager (NSUM) / Senior Unit Manager (SUM)	01 July 2024

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您的委任申請已被上線營業單位主管及 / 或區域總監退回，不會作進一步處理。

財務策劃顧問編號	財務策劃顧問姓名	財務策劃顧問營業單位名稱	申請職銜	委任生效日期
D0001	陳大文 17	Agency Name 17	新晉資深分區經理 (NSUM) / 資深分區經理 (SUM)	01 July 2024

如有查詢，請與您所屬的 Head of Agency Division 或 Agency Business Partner 聯絡。
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Re-submission of Appointment Application

If the applicant re-submit application while prior application is pending for approval, email will be sent to applicant **“[Re-submission] Application for NSUM/SUM Appointment”**
Re-submitted application cannot be processed unless the previous application request is returned by the upline Agency Leader and/or District Director. Only the last approved applications will be considered by the Company.



[重新遞交] 新晉資深分區經理/資深分區經理委任申請 [Re-submission] Application for NSUM/SUM Appoint...

aiahk.agency-digital-administration@aia.com

To CHAN TAI MAN

Reply | Reply All | Forward | ...

Thu 05/30/2024 4:56 PM

Translate message to: English | Never translate from: Chinese (Traditional) | Translation preferences

You have **re-submitted** the application for appointment. However, your application submitted at 2024-05-30 16:54 is still pending for approval. **Re-submitted application cannot be processed unless the previous application request is returned by your upline Agency Leader and/or District Director.**
Please be reminded only the last approved applications will be considered by the Company.

For any queries, please contact your respective Head of Agency Division or Agency Business Partner.
This is a system-generated message. Please do not reply to the sender.

您已**重新遞交**委任申請。但較早前您於 2024 年 05 月 30 日 08 時 54 分遞交的委任申請仍待批准中，**除非您的上線營業單位主管及／或區域總監退回您先前的申請，否則無法處理重新遞交的委任申請。**
請注意：公司只會就最後已批准的委任申請作審批。

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Thank you

