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Memo

Attn: ALL EDD & Honorable Advisors/
EDDs / PSDDs / SDDs / DDs / MICs /
Agency Leaders and Financial Planners
(Hong Kong)

From: Agency Recruitment Collaboration Circle (ARCC)

Copy: Mr. Alger Fung/ Mr. Jim Jan Zen/
All Department Heads/ All ABDD
Executives/ All BTDD Members

Date: 5 July 2024

Total page: 5

Subject: **A240746 – Key Notes to Effective License Registration for New Financial Planner**

新財務策劃顧問登記上牌之要訣

為幫助大家以最快速度招募優秀人才，交齊所需文件，營業招募合作團隊 (Agency Recruitment Collaboration Circle) 先後舉辦<招募流程秘笈班>及推出<邦招募>，有關招募流程秘笈 PPT 及<邦招募>資料已上載 iRecruit> 行業資料> 招募工具。

此外，現綜合 2024 年上半年新財務策劃顧問登記上牌的十大要點及補充處理要訣如下：

要點	處理事項	請參考招募流程秘笈 PPT/處理要訣
第一	如何申報現時 / 最近前受僱資料	PPT – P. 17
第二	入境簽證及其他所需資料 (非香港永久性居民)	PPT – P. 49 to 51
第三	學歷所需資料(包括國內學歷所需的認證資料)	PPT – P. 31 to 48
S 第四	住址填寫要求	PPT – P. 16
第五	需完成<友邦事業發展潛能測試/人工智能面試>	進入 iRecruit>點擊行業資料>  
第六	背景查核	網上訴訟查冊/金融監管機構查核, 如有姓名相同:如實回答真偽, 如非本人則要填寫聲明書
第七	營業員合約	PPT – P. 3

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第八	銀行户口資料(只須在 iRecruit 填寫及提供户口資料)	上載清楚顯示姓名、銀行名稱及户口號碼之證明
第九	中文名及中文商用電碼之填寫	PPT – P. 15
第十	辦公地址	PPT – P. 16

透過一系列的招募配套，助你以最快的速度招募優秀人才並共同達成招募目標!

藉此提醒如準招募於入職時/前發生以下情況，應向保監局及公司申報如實相關事宜，並確保提供之資料及文件真確無誤：

- 被香港或其他地方的法院裁定破產或受到個人自願安排(債務重組)
- 經營的公司或機構曾被強制清盤
- 在香港或其他地方被裁定干犯刑事罪行（輕微罪行除外）
- 受到保監局、金融管理專員、證券及期貨事務監察委員會、強制性公積金計劃管理局或其他監管機構紀律處分
- 被任何執法機關、監管機構或當局於香港或其他地方拘捕或調查

此致
營業招募合作團隊

为帮助大家以最快速度招募优秀人才，交齐所需文件，营业招募合作团队（Agency Recruitment Collaboration Circle）先后举办〈招募流程秘笈班〉及推出〈邦招募〉，有关招募流程秘笈 PPT 及〈邦招募〉资料已上载 iRecruit〉行业资料〉招募工具。

此外，现综合 2024 年上半年新财务策划顾问登记上牌的十大要点及补充处理要诀如下：

要点	处理事项	请参考招募流程秘笈 PPT/处理要诀
第一	如何申报现时/最近前受雇资料	PPT – 第 17 页
第二	入境签证及其他所需资料（非香港永久性居民）	PPT – 第 49 至 51 页
第三	学历所需资料（包括国内学历所需的认证资料）	PPT – 第 31 至 48 页
第四	住址填写要求	PPT – 第 16 页

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第五	需完成<友邦事业发展潜能测试/人工智能面试>	進入 iRecruit>點擊行業資料>  
第六	背景查核	网上诉讼查册/金融监管机构查核，如有姓名相同：如实回答真伪，如非本人则要填写声明书
第七	营业员合约	PPT – 第 3 页
第八	银行户口资料（只须在 iRecruit 填写及提供户口资料）	上载清楚显示姓名、银行名称及户口号码之证明
第九	中文名及中文商用电码之填写	PPT – 第 15 页
第十	办公地址	PPT – 第 16 页

透过一系列的招募配套，助你以最快的速度招募优秀人才并共同达成招募目标！

藉此提醒如准招募于入职时/前发生以下情况，应向保监局及公司申报如实相关事宜，并确保提供之资料及文件真确无误：

- 被香港或其他地方的法院裁定破产或受到个人自愿安排（债务重组）
- 经营的公司或机构曾被强制清盘
- 在香港或其他地方被裁定干犯刑事罪行（轻微罪行除外）
- 受到保监局、金融管理专员、证券及期货事务监察委员会、强制性公积金计划管理局或其他监管机构纪律处分
- 被任何执法机关、监管机构或当局于香港或其他地方拘捕或调查

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To support our agency force in achieving quality recruitment in a faster pace & also to easily handle the needed documents, ARCC (Agency Recruitment Collaboration Circle) has implemented the "Recruitment Training Class" and "Recruitment Tour Guide" Please check out the PPT of the "Recruitment Training Class" & the information of the "Recruitment Tour Guide" in iRecruit >Industry Information> Recruitment Tools.

Moreover, we have consolidated the first half year of 2024, the top 10 pay attention areas regarding new financial planner license registration.

Items	Pay Attention Areas	Please refer to the attached file or below illustration
No. 1	Employment (msut declare current / last employment)	PPT – P. 17
No. 2	Visa & uploading needed documents (Non Permanent HKID Holder)	PPT – P. 49 to 51
No. 3	Academic / education qualifications (including the verification for PRC Qualifications)	PPT – P. 31 to 48
No. 4	Residential address format	PPT – P. 16
No. 5	Completion of CAT/AI Interview	Login iRecruit > click industry info > 友邦人工智能面試 友邦事業發展潛能測試
No. 6	Background search	If name hit in leagal & Financial Regulators searching: must delcare upon the truth or to provide self-declaration if false hit
No. 7	Career Representative Contract submission	PPT – P. 31 to 48
No. 8	Bank Account Autopay information (iRecruit Only)	Upload document must show clearly the Name, Bank Name & the Account no.)
No. 9	Chinese Name & Chinese Name Commercial Codes	PPT – P. 15
No. 10	Business address	PPT – P. 16 (All aligned to : 1/F, AIA HONG KONG TOWER)

With a series of recruitment supports and tools, let's act fast for quality recruits and achieve recruitment target together!

We hereby remind all potential recruits to declare the following incidents before / during registration to Insurance Authority and Company, and ensure the information and documents provided are accurate:

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- Adjudicated bankrupt by a court in Hong Kong or elsewhere or is subject to an Individual Voluntary Arrangement (IVA)
- Wound up by the court of your company or institutions
- Convicted of a criminal offence (other than a minor offence) in Hong Kong or elsewhere
- Disciplined by Insurance Authority, the Monetary Authority, the Securities and Futures Commission, the Mandatory Provident Fund Schemes Authority or other regulators
- Arrested or being investigated by any law enforcement authorities, any regulatory bodies, any authorities in Hong Kong or elsewhere

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