**AIA Hong Kong**
27/F, Hopewell Centre,
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# Memo

| | | | |
|---|---|---|---|
| Attn: | EDDAs / EDDs / PSDDs / SDDs / DDs / MICs / Agency Leaders / UMs / AUMs | Dept: | Premier Agency Development Department |
| Copy: | Mr. Alger Fung / Ms. Amy Chan / All Department Heads / Heads of Agency Division / ABDD – ABPs | Total Page: | 14 |
| Date: | 8 December, 2025 | | |
| Subject: | **(A251225) 區域實習課程計劃 2026 District Internship Program 2026** | | |

為配合市場上有大量大學在讀學生及非本地留學生, 並幫助他們成為未來的全方位財務策劃精英, 開展屬於自己的成功事業; 公司一直積極鼓勵區域推行實習課程計劃, 因此現更新及強化**區域實習課程計劃**, 並期望各位招募者透過區域主導的課程內容加強接觸大專院校學生。

我們亦特別準備「區域實習課程計劃 注意事項、申請流程及指引」(請參閱附件), 令各區域能以更高效率及更具規模地開展課程, 請根據以下附件指引作出申請。

此通告將取代現有通告**(A220519) 區域實習課程計劃 2022 - 注意事項、申請流程及指引**。

To align with the growing number of university students and non-local international students in the recruitment market, and to help them become future all-round financial planning professionals and build their own successful careers, AIA has been actively encouraging districts to implement internship program initiatives.

Therefore, we are now updating and strengthening the District Internship Program and expect recruiters to enhance engagement with university and postgraduate students through District based program content.

We have also specially consolidated the ***application process, guidelines and do's and don'ts for District Internship Program*** (please refer to appendix) to enable each district to launch the program more efficiently.

Please follow the instructions in the attached guidelines to begin your application process.

This memo will replace the existing memo **(A220519) District Internship Program 2022 – Precautions, Application Procedures and Guidelines**.

Best Regards,

Joel Lee
Head of Premier Agency Development

JL/PZ/RY

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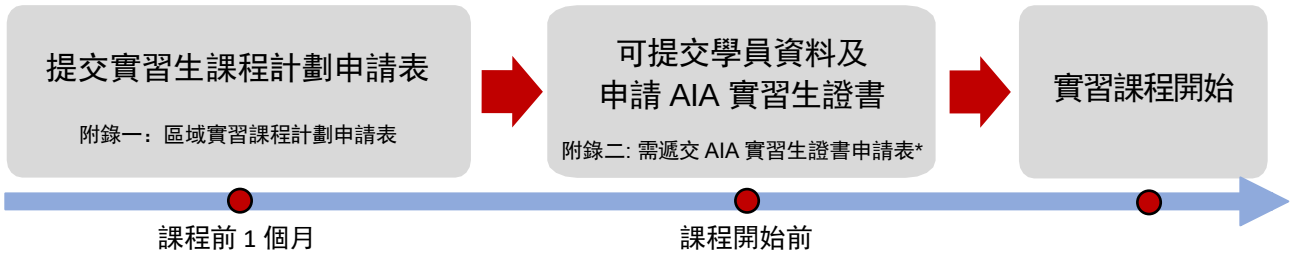
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## 實習生課程計劃申請流程

為使各區域能以更高效率及更具規模地開展課程, 請按照以下流程作出申請。




*區域可向卓越營業發展部申請 AIA 實習生證書, 其審批時間、所需文件及要求如下:

| | |
|---|---|
| **審批時間** | 7 個工作天 |
| **文件要求** | **1. 附件一 - 區域實習課程計劃申請表**<br>2. **附件二 - AIA 實習生證書申請表**, 包括:<br>• 出席名單及學員姓名<br>• 出席記錄 (學員需達 80%出席率才合資格申請 AIA 實習生證書)<br>• 身份證首 4 位英文字母或數字<br><br>如申請 AIA 實習生證書，請填寫並提交**附件二 - AIA 實習生證書申請表**至 aiahk.premieragency@aia.com |

## 實習生課程計劃注意事項

公司十分關注各財務策劃顧問之專業行為，由此提出以下相關注意事項:

| 該做 | 不該做 |
|---|---|
| ▪ 提議為學員在「友招募」建立「新準招募」, 並向準招募遞交 3 個月「鎖定要求」及發送「友邦事業發展潛能測試」<br>▪ 遵從「保障客戶個人資料私隱法例及守則」[1]<br>▪ 收集個人可識別資訊時，區域必須向資料當事人提供「個人資料收集聲明」[2]<br>▪ 嚴禁以任何形式向其他學員散播或作出任何不恰當之言論, 訊息或行爲<br>▪ 請保持正面的財務策劃顧問形象及態度, 並與學員建立良好的關係<br>▪ 應時刻保持學員在安全環境下進行各類活動 | ▪ 在境外(即香港/澳門以外國家或地區)[3]<br>○ 進行任何招募活動<br>○ 製作單張或廣告牌或以任何方式推廣或介紹實習生課程<br>○ 安排及組織學員以遊學團、旅遊團形式赴香港/澳門參加實習生課程<br>▪ 透過電子渠道為實習生課程進行境外推廣。電子渠道包括但不限於互聯網網站、社交媒體、電子郵件、電子訊息、短訊或社群平台<br>▪ 請注意每位學員參與活動時不可涉及任何銷售程序，確保遵從公司指引及監管要求<br>▪ 請避免與學員涉及金錢交易 |

為保持業務操守的專業指標,財務策劃顧問務必時刻遵守公司指引。所有區域實習課程的嚴重違規個案將被呈交至 Market Conduct Committee("MCC") 進行審理。

如有任何異議，以 AIA 最後決定為準。

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[1] 《個人資料(私穩)條例》(香港適用) /《個人資料保護法》(澳門適用)
[2] 友邦保險（國際）有限公司《個人資料收集聲明》
https://www.aia.com.hk/zh-hk/privacy-statement-main/personal-information-collection-statement-aiahk (香港適用)
https://www.aia.com.hk/zh-hk/privacy-statement-main/personal-information-collection-statement-aiamo (澳門適用)
[3] 詳情請參閱通告 A240356

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## 附錄一：區域實習課程計劃申請表

請填妥申請表並提交至電郵 aiahk.premieragency@aia.com。

本人, _____ (區域執行總監及榮譽顧問 / 區域執行總監 / 高級資深區域總監 / 資深區域總監 / 區域總監名稱) _____ (營業員號碼) 來自 _____ (區域名稱) 已閱讀及清晰明白本通告內容。

| **甲部 - 申請人資料** | |
|---|---|
| 負責人姓名 | |
| 營業員編號 / S-CODE | |
| 負責人手提電話號碼 | |
| 負責人電郵地址 | |

| **乙部 - 區域實習課程資料** | |
|---|---|
| 課程日期 | |
| 總實習日數 | |
| 地點 | |
| 預計參與人數 | |

| **丙部 - 課程內容** |
|---|
| 會申請 AIA 實習生證書? (如申請, 請填寫並提交**附件二 - AIA 實習生證書申請表**。)<br>☐ 申請 ☐ 不申請 |
| (請詳細提供每日課程內容。如有需要, 可額外附上課程文件。) |

**卓越營業發展部**

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## 附件二 - AIA 實習生證書申請表

| No. | 出席學員姓名 | 身份證首 4 位英文字母或數字 | 出席記錄 (學員需達 80%出席率才合資格申請 AIA 實習生證書) |
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| No. | 出席學員姓名 | 身份證首 4 位英文字母或數字 | 出席記錄 (學員需達 80%出席率才合資格申請 AIA 實習生證書) |
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## 附件三 - 財務策劃實習生相關福利 [1]

### I. 主管相關

| | 財務策劃實習生是否被納入 | | |
|---|---|---|---|
| | **人數計算?** | **活動量計算?** | **營業單位 / Group FYC 計算?** |
| **晉升要求** | | | |
| **晉升（助理分區經理、分區經理）** | X (新招募及在職人數) | 不適用 | 不適用 |
| **晉升（新晉資深分區經理）** | X (團隊人數) | 不適用 | √ |
| **晉升（區域經理、資深區域經理、高級資深區域經理、區域總監、資深區域總監）** | X (團隊人數) | 不適用 (基準 / 達標人數均不會計算) | √ |
| **主管報酬 及 其他福利** | | | |
| **主管基本酬金及下線發展佣金(ADOR) 第一部分** | 不適用 | 不適用 | √ |
| **主管下線發展佣金 (ADOR) 第二部分 - 額外 5%** | X (新招募) | 不適用 | X |
| **主管個人續保佣金花紅第二級別 - 下調至 6 個月活動量** | X (達標新招募) | 不適用 | 不適用 |
| **營業單位續保花紅** | 不適用 | 不適用 | √ |
| **車位及商務津貼 - 每月業績津貼** | 不適用 | 不適用 | √ |
| **車位及商務津貼 -每年業績津貼** | 不適用 | 不適用 | √ |
| **車位及商務津貼 -每年人力資源津貼** | X (1+6) | 不適用 | √ |
| **車位及商務津貼 -每年招募津貼** | X (達標新招募) | 不適用 | √ |
| **團體人壽保險計劃 / 團體醫療保險計劃 / 公積金 (香港營業單位主管)** | X (1+6) | 不適用 | √ |
| **助理分區經理/分區經理的業績花紅** | 不適用 | 不適用 | √ |
| **維持合約要求** | | | |
| **主管維持合約要求 - 團隊成員人數** | X (1+6) | 不適用 | 不適用 |
| **助理分區經理/分區經理的延續委任要求** | X (新招募及在職人數) | 不適用 | 不適用 |
| **獎項及會籍要求** | | | |
| **區域排名獎項（如最傑出資深分區經理）** | X (團隊人數) | 不適用 | √ |
| **最傑出招募獎（區域）/ 最傑出招募獎** | X (新招募) | 不適用 | X (如排名相同) |
| **超級傑出區域 / 傑出區域 / 最佳區域** | X (1+6)<br>√ (達到 MOC 要求的顧問人數) | 不適用 | √ |
| **年度卓越服務營業單位 / 年度卓越服務區域** | 不適用 | 不適用 | √ |
| **卓越營業單位主管** | X | 不適用 | √ |
| **百萬圓桌會區域 / 卓越顧問區域相關獎項** | 不納入計算基準，但若財務策劃實習生取得卓越顧問 / 百萬圓桌會會籍，則將被納入計算為達標人數 | | |
| **公司以外的獎項（如 QMA、DMA、GAMA）** | √ | 不適用 | √ |

此外，財務策劃實習生的業績會被納入營業單位及區域的 1) 續保率 及 2) 保單數目計算 (如適用)

[1] 內容只供參考並會隨時更新, 最新詳情請參閱**報酬及福利手冊 - 適用於財務策劃顧問及營業單位主管**。

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## II. 財務策劃實習生相關

| | 參與資格 |
|---|---|
| **財務策劃顧問優化要求** | |
| 財務策劃顧問優化計劃 | 豁免參與 |
| **獎項及會籍** | |
| A 動力發展藍圖 (首輪挑戰) | X |
| A 動力發展藍圖 (第二輪挑戰 – 活躍起動) | √ |
| 年度最傑出財務策劃顧問 / 最傑出新晉財務策劃顧問 / 傑出區域財務策劃顧問 | √ |
| 躍動之星 / 躍動之星 2.0 (Active Club / Active Club Plus 2.0)會籍 | √ |
| 屬財務策劃顧問公司以外的獎項（如 DAA、DSA、OYSA、IQA、QAA、IDA） | √ |
| 超級巨星會會員(SSC)/ 百萬金圓會特別會員(SMDC)/ 百萬金圓會會員(MDC)/ 百萬金圓會暫準會員(PMDC)會籍 | √ |
| 財務策劃顧問持股計劃（ASPP） | √ |
| 馬拉松成就真夥伴會員(Marathon Save a Life Club)會籍 | √ |
| 「AIA Vitality 健康程式」最佳個人業績大獎 | √ |
| CS 個人自選保障方案（IVS）年度獎 / CS 團體保險及退休金年度獎 / 團險精英會 (GAC) | √ |
| 最佳投資連繫壽險財務策劃顧問獎 /高端市場開發業務獎 / HNW 會籍 | √ |
| **海外業務會議相關** | |
| 小龍會 | X |
| 巨龍會 / 高峰會 | √ |

[1] 內容只供參考並會隨時更新, 最新詳情請參閱**報酬及福利手冊 - 適用於財務策劃顧問及營業單位主管**。

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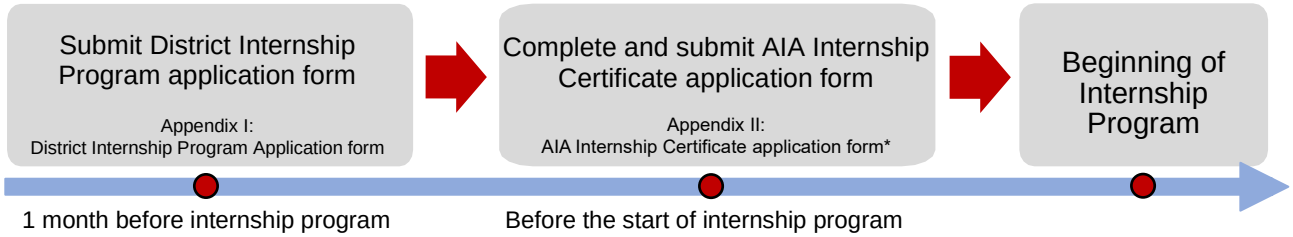
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## District Internship Program Application Procedures

To allow districts to conduct courses more efficiently, please follow the application process outlined below.




*Districts may apply to Premier Agency Development Department for the AIA Internship Certificate. The approval timeline, required documents, and requirements are as follows:

| | |
|---|---|
| **Approval processing time** | 7 business days |
| **Required documents** | 1. Appendix I – District Internship Program application form<br>2. Appendix II – AIA Internship Certificate application form<br>• Full Name list<br>• Attendance Rate (Participants with 80% or above attendance rate are entitled to apply for the certificate)<br>• First 4 digits of HKID<br><br>Please complete and submit **Appendix II – AIA Internship Certificate application form** to aiahk.premieragency@aia.com |

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## District Internship Program Precautions

AIA places great emphasis on the professional conduct of all Financial Planners and therefore has outlined the following important notes:

| Do's | Don'ts |
|---|---|
| ▪ Propose creating a 'New Recruit Profile' for the prospect in iRecruit, and submitting 'Pink Card' for the prospect, as well as send the 'AIA Career Aptitude Test'<br>▪ Comply with Legislation and Guidance on Data Privacy[1]<br>▪ When collecting personally identifiable information, district must provide the Personal Information Collection Statement ("PICS")[2] to the prospect<br>▪ It is strictly prohibited to spread or make any inappropriate remarks, messages, or actions towards prospects in any form<br>▪ Maintain a positive image and attitude as a Financial Planner and build good relationships with prospects<br>▪ Ensure that prospects are always engaged in activities within a safe environment | ▪ Conduct the following activities outside Hong Kong/Macau, for example: [3]<br>o Conduct any recruitment activities<br>o Produce leaflets, billboards, or promote/introduce the internship program in any form<br>o Arrange or organize participants to join the internship program in Hong Kong/Macau in the form of study tours or travel groups<br>▪ Promote the internship program overseas through electronic channels. Electronic channels include but are not limited to websites, social media, email, electronic messages, SMS, or community platforms.<br>▪ Please ensure that participants do not engage in any sales activities during the event and comply with company guidelines and regulatory requirements.<br>▪ Avoid any monetary transactions with participants. |

All cases of non-compliance will be escalated to the Market Conduct Committee (MCC) for deliberation. If substantiated, the Company shall impose penalties ranging from a written warning to termination of contract depending on the severity of the violation.

In the event of dispute, AIA's decision is final and conclusive.

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[1] Personal Data (Privacy) Ordinance (For Hong Kong only) / Personal Data Protection Act (For Macau only)
[2] AIA Personal Information Collection Statement
https://www.aia.com.hk/en/privacy-statement-main/personal-information-collection-statement-aiahk (For Hong Kong only)
https://www.aia.com.hk/en/privacy-statement-main/personal-information-collection-statement-aiamo (For Macau only)
[3] Please see memo A240356

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T: (852) 2881 3333

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## Appendix I – District Internship Program application form

Please complete application form and submit to aiahk.premieragency@aia.com

_____ (Executive District Director & Honourable Advisor/ Executive District Director/Premier Senior District Director/ Senior District Director/ District Director Name) _____ (Agent Code) from _____ (District Name) have read and clearly understood the contents of this notice.

| **Part A – Person-in-charge details** | |
|---|---|
| Name of Person-in-charge ("PIC") | |
| Agent Code / S-Code | |
| Mobile of PIC | |
| Email of PIC | |

| **Part B –District Internship Program details** | |
|---|---|
| Program Period | |
| Total Days | |
| Venue | |
| Anticipated participants | |

**Part C – Program Rundown**

Would you apply for AIA Internship Certificate?
(If answer yes, please complete and submit **Appendix II – AIA Internship Certificate application form**.)
☐ Yes ☐ No

(Please provide the full schedule, you might submit extra documents for Program Rundown if needed.)

**Premier Agency Development**

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## Appendix II – AIA Internship Certificate application form

| No. | Full Name | First 4 digits of HKID | Attendance Rate (Participants with 80% or above attendance rate are entitled to apply for the certificate) |
|---|---|---|---|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |
| 7 | | | |
| 8 | | | |
| 9 | | | |
| 10 | | | |
| 11 | | | |
| 12 | | | |
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| 20 | | | |
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| 26 | | | |
| 27 | | | |
| 28 | | | |
| 29 | | | |
| 30 | | | |

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| No. | Full Name | First 4 digits of HKID | Attendance Rate (Participants with 80% or above attendance rate are entitled to apply for the certificate) |
|---|---|---|---|
| 31 | | | |
| 32 | | | |
| 33 | | | |
| 34 | | | |
| 35 | | | |
| 36 | | | |
| 37 | | | |
| 38 | | | |
| 39 | | | |
| 40 | | | |
| 41 | | | |
| 42 | | | |
| 43 | | | |
| 44 | | | |
| 45 | | | |
| 46 | | | |
| 47 | | | |
| 48 | | | |
| 49 | | | |
| 50 | | | |
| 51 | | | |
| 52 | | | |
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| 56 | | | |
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| 58 | | | |
| 59 | | | |
| 60 | | | |

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## Appendix III – Internship Contract related benefits[1]

### I. Leader Related

| | Is internship counted into | | |
|---|---|---|---|
| | **Manpower?** | **Activity Ratio?** | **Agency / Group FYC?** |
| **Promotion** | | | |
| **Promotion (AUM / UM)** | X (New Recruit and Inforce Manpower) | N/A | N/A |
| **Promotion (NSUM)** | X (Qualified Manpower) | N/A | √ |
| **Promotion (BrM / DM / SDM / DD / SDD)** | X (Qualified Manpower) | N/A (excluded from both numerator/ denominator) | √ |
| **Leader Compensation and Other Benefits** | | | |
| **Override and Agency Development Override (ADOR) Part 1** | N/A | N/A | √ |
| **Agency Development Override (ADOR) Part 2 – Extra 5%** | X (New Recruit) | N/A | X |
| **Career Benefit Level 2 - Relaxed to 6 months** | X (Validated New Recruit) | N/A | N/A |
| **Persistency Bonus** | N/A | N/A | √ |
| **Car Park and Business Allowance - Monthly Production Allowance** | N/A | N/A | √ |
| **Car Park and Business Allowance - Annual Production Allowance** | N/A | N/A | √ |
| **Car Park and Business Allowance - Annual Manpower Allowance** | X (1+6) | N/A | √ |
| **Car Park and Business Allowance - Annual Recruitment Allowance** | X (Validated New Recruit) | N/A | √ |
| **Agency Group Life Plan / Agency Group Medical Plan** | X (1+6) | N/A | √ |
| **Production Bonus for Assistant Unit Manager / Unit Manager** | N/A | N/A | √ |
| **Contract Maintenance** | | | |
| **Contract Maintenance of Agency Leader – Manpower Requirement** | X (1+6) | N/A | N/A |
| **Qualifying Rules of AUM / UM Extension** | X (New Recruit and Inforce Manpower) | N/A | N/A |
| **Clubs and Awards** | | | |
| **Regional Ranking Award (e.g. Top Senior Unit Managers of the Year)** | X (1+6, Manpower) | N/A | √ |
| **Top Recruiters Award (District Award) / Top Recruiters Award** | X (New Recruit) | N/A | X (In case of a tie) |
| **SGDOY / GDOY / DOY** | X (1+6)<br>√ (Qualified Manpower) | N/A | √ |
| **Excellent Service Agencies of the Year / Excellent Service Districts of the Year** | N/A | N/A | √ |
| **Premier Agency Leader** | X | N/A | √ |
| **MDRT District and Premier Advisor District related** | Excluded from the base but Headcount will be counted if the intern achieved MDRT | | |
| **Leader External Awards (i.e. QMA, DMA, GAMA)** | √ | N/A | √ |

In addition, internship production is counted into 1) persistency and 2) case count in agencies and districts (if applicable).

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## II. Internship Related

| | Eligibility |
|---|---|
| **Agency Enhancement Requirement** | |
| Agency Enhancement Program for Financial Planner | Exempted |
| **Clubs and Awards** | |
| A-Force (First Challenge) | X |
| A-Force (Next Challenge – Active Fast Start) | √ |
| Financial Planners of the Year / New Financial Planners of the Year / Financial Planner of the District | √ |
| Active Club / Active Club Plus 2.0 membership | √ |
| External award for Financial Planner (i.e. DAA, DSA, OYSA, IQA, QAA, IDA) | √ |
| SSC/SMDC/MDC/PMDC Club Membership | √ |
| Agency Share Purchase Plan (ASPP) | √ |
| Marathon Save a Life Club | √ |
| AIA Vitality Top Producers Award | √ |
| CS IVS (Individual Voluntary Solution) Annual Award / CS Annual Award – Group Insurance & Pension / Group Achiever Club (GAC) | √ |
| Top ULB Producers Awards / HNW Business Award (Producer) / HNW Club (Producer) | √ |
| **Overseas Conference Related** | |
| MIS | X |
| Dragons' Meeting / Summit Club | √ |

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