**AIA Hong Kong**

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

**AIA.COM.HK**

# Memo

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

From: Stephen Chan

Co/Dept:

Dept: MCV Business Development

Copy: All Department Heads

Total Page: 2

Date: 27 March 2023

Subject: (Ref: A230364) i 認證小貼士 2
Tips on Performing iVerify 2

繼早前發出的memo (A221154)，在此再次提示大家為抵港內地客戶進行i認證時的注意事項，使投保申請順利完成。

1. i認證內必須拍攝客戶旅遊證件（包括入境標籤及延長逗留簽證或申請延長逗留的申請文件）的**正本**，如有發現該拍攝文件不是正本(例如：以iPad拍攝手機內之證件相片，俗稱’相中相’或拍攝證件的副本），客戶認證將視為無效，客戶需再次到港重新進行認證及投保程序
2. 拍攝客人照片時, 必須為**真人拍照**, 不得拍下證件代替另必須清晰及除口罩拍攝
3. 如客人已遺失入境標籤，財務策劃顧問則不能使用i認證(包括保戶服務(POS)的申請)，請帶同客人到財駿中心，由中心職員進行認證。
4. 使用i認證的投保書須於認證日 7 天內遞交，**逾期遞交的投保申請將不可遞交**。
5. 投保申請書及相關所須文件務必在適當位置簽署及簽名必須一致
6. 如投保申請人或/及受保人為財務策劃顧問本人, i認證**必須**透過財駿中心職員進行認證
7. 遞交之建議書(PGS)需使用(非香港/澳門)建議書，即使客戶因疫情留港已超過 182 日或更長時間，亦需使用(非香港/澳門)建議書 。
8. 如因疫情關係延長逗留香港而未能提供有效的入境證明，公司將作以下的特別處理：

   A) 客戶需提供以下文件作**入境證明的**認證：
      a. 由香港入境處發出已過期的入境標籤 **及**
      b. 由香港入境處發出的延長逗留簽證或申請延長逗留的申請文件。

   B) 認證方法：
      i. 財務策劃顧問可陪同客戶到財駿中心，由財駿中心職員為客戶進行認證，或
      ii. 如客戶未能安排時間到訪財駿中心，財務策劃顧問可為客戶以 i 認證進行認證，
      iii. 於 i 認證拍攝入境標籤的鏡頭內同時拍攝第一點提及的文件 a 及 b。

請留意有關以上的特別處理將於保單申請文件遞交後，保單的繕發需經公司內部批核。

如有查詢，請致電 92839322/ 63153766/ 63102262/ 98299950 與 MCV Business Development Support Team 聯絡

只供內部使用 FOR INTERNAL USE ONLY
於這通告內所提及的「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

**AIA Hong Kong**

AIA Financial Centre,
712 Prince Edward Road East,
Kowloon, Hong Kong
T: (852) 2881 3333

**AIA.COM.HK**

# Memo

Following the memo (A221154) issued earlier, we would like to remind all of you again the handling procedures of iVerify for MCV customers visiting Hong Kong to let the application to be completed smoothly.

1. Original document is required for iVerify, please ensure to capture the original of the customer travel documents (including the entry slip and extended visa or the application document for extension of stay in Hong Kong). If it is found that the iVerify image was not taken from an original document (e.g., capturing picture of travel document in cell phone by iPad, i.e., Photo in Photo or photocopy of the travel document), the verification will be considered invalid, and the customer is required to visit Hong Kong again to follow up the verification and policy application
2. When using iVerify, the photo must be clear and taken without a mask, it must be a photo of a real person, taken in photo is not allowed
3. No iVerify is allowed for missing entry slip, please visit Wealth Select Centre (WSC) with client (including POS request), WSC staff will complete the verification process for client
4. All applications using iVerify are required to submit to Company within 7 days from verification date, those overdue applications cannot be submitted
5. For signing the insurance application form and related required documents, they must be signed in the appropriate signature box and the signatures must be consistent
6. If the insurance applicant and/or the insured person is a financial planner themselves, the iVerify must be completed by the staff of Wealth Select Centre (WSC)
7. Financial Planner must use the updated (non-Hong Kong/Macau) PGS, even the client has been in town for more than 182 days or even longer
8. If MCV customers extended to staying in Hong Kong during the pandemic period and cannot provide the valid entry proof for verification, the Company has following special handling:

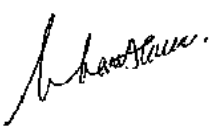
    A. MCV customers are required to provide the following documents for **valid entry proof** verification：
        a. The expired landing slip issued by Hong Kong Immigrations **AND**
        b. The extended visa issued by Hong Kong Immigrations OR the application document for extension of stay in Hong Kong.

    B. Verification method:
        i. Financial Planners visit Wealth Select Centre (WSC) with customers，WSC staff will perform the verification for customers，OR
        ii. If customers are not able to visit WSC，Financial Planners can perform the iVerify for their customers.
        **iii. Capture both the document a and b mentioned in point A in landing slip camera of iVerify.**

Please note that the above-mentioned special handling is subject to Company approval after the policy application is submitted.

For any enquiry, please contact MCV Business Development Support Team by 92839322/ 63153766/ 63102262/ 98299950

Regards,



Stephen Chan
Director, MCV Business Development

只供內部使用 FOR INTERNAL USE ONLY
於這通告內所提及的「AIA」、「友邦」或「友邦香港」是指友邦保險（國際）有限公司（於百慕達註冊成立之有限公司）。"AIA" or "AIA Hong Kong" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).