



AIA Hong Kong

AIA Financial Centre,  
712 Prince Edward Road East,  
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AIA.COM.HK

## Memo

Attn: All Business Partners

From: Anne Weedon

Dept: Partnership Distribution

Date: 12 Dec 2012

Total page: 4

Subject: (Ref: A2012127) Recapture Program – Special Offers for Selected Customers

「接續投保」推廣計劃 – 專享優惠至特選客戶

為答謝客戶多年以來對公司的支持，我們特別推出「接續投保」推廣計劃予特選客戶，希望藉此能全方位協助各業務代表有效地為客戶延續保障，尋找更多商機。

### 推廣活動簡介

特選客戶	於2012年5月1日至2013年1月31日 期間之 <u>付清保費保單(Paid-up)</u> 之客戶  付清保費之儲蓄計劃包括以下計劃： <ul style="list-style-type: none"><li>✓ 高息保儲蓄計劃</li><li>✓ 儲速終身保</li><li>✓ 易達速蓄保</li><li>✓ 保證定息儲蓄(人民幣)</li><li>✓ 「年金寶」入息計劃</li></ul>										
推廣期	<b>2012年12月1日至2013年2月28日</b> (以新保單之保單申請日期為準*)，而新保單須於2013年3月31日或之前續發。 *備忘錄發出前但於推廣期內之新保單申請，亦可享此優惠。										
推廣優惠	特選客戶於推廣期內購買指定的推廣產品，可獲以下優惠： <table><tr><th>優惠</th><th>推廣產品</th><th>專享優惠</th></tr><tr><td>(1)</td><td>「裕滿人生」保障計劃</td><td rowspan="2">首月保費回贈</td></tr><tr><td>(2)</td><td>「裕滿人生」保障計劃(簡易版)</td></tr></table> 詳情請參閱推廣優惠條款及細則			優惠	推廣產品	專享優惠	(1)	「裕滿人生」保障計劃	首月保費回贈	(2)	「裕滿人生」保障計劃(簡易版)
優惠	推廣產品	專享優惠									
(1)	「裕滿人生」保障計劃	首月保費回贈									
(2)	「裕滿人生」保障計劃(簡易版)										
客戶名單	特選客戶名單於2012年12月13日上載至Partnership Distribution Corner。請登入 Partnership Distribution Corner → 電子服務 → 客戶活動管理 (詳情請參閱附錄)										

請將以上訊息傳予相關合資格業務代表。如有任何疑問，請致電保險及理財顧問熱線 3972 8899。。

注意：於這通告內所提及的「友邦香港」或「AIA」或「公司」或「我們」「AIA 香港」或「公司」是指美國友邦保險(百慕達)有限公司

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To express our thanks to customers' ongoing support, we are glad to provide the recapture promotion offer to selected customers. Please grasp this sales opportunity to assist customers to extend their protection.

**Promotion Highlights**

<b>Promotion Highlights</b>									
<b>Selected Customers</b>	Customers with policy(ies) <b><u>paid-up</u></b> during 1 May 2012 to 31 Jan 2013  Paid-up saving plans include: <ul style="list-style-type: none"><li>✓ Target Saver</li><li>✓ Quick Saver</li><li>✓ Executive Saver</li><li>✓ GIS RMB</li><li>✓ Golden Years Income Plan</li></ul>								
<b>Promotion Period</b>	<b>From 1 December 2012 to 28 February 2013</b> (based on the new policy Application Date*) and the new policy must be issued by 31 March 2013.  * New policy applications within the promotion period but before the memo issue date are also eligible to enjoy the promotion offer.								
<b>Promotion Offers</b>	The following offers will be exclusively offered to the selected customers who purchase the specific promotion products: <table border="1"><thead><tr><th>Offer</th><th>Promotion Products</th><th>Exclusive Offers</th></tr></thead><tbody><tr><td>(1)</td><td><b>Admire Life</b></td><td rowspan="2"><b>First Month Premium Refund</b></td></tr><tr><td>(2)</td><td><b>Admire Life (Simple Version)</b></td></tr></tbody></table> Please refer to the Terms and Conditions of the Promotion Offer for more details.	Offer	Promotion Products	Exclusive Offers	(1)	<b>Admire Life</b>	<b>First Month Premium Refund</b>	(2)	<b>Admire Life (Simple Version)</b>
Offer	Promotion Products	Exclusive Offers							
(1)	<b>Admire Life</b>	<b>First Month Premium Refund</b>							
(2)	<b>Admire Life (Simple Version)</b>								
<b>Customer list</b>	Target customer list will be uploaded to Partnership Distribution Corner on 13 Dec 2012. Please Login to: Partnership Distribution Corner → e-Service → Customer Campaign Management (Please refer to Appendix for details)								

Kindly convey the above message to all your fellow qualified Technical Representatives. For any enquiries, please feel free to call our Brokerage & IFA Hotline 3972 8899.

Best regards,

Anne Weedon  
Head of Partnership Distribution

Note: "AIA Hong Kong" or 'We' or 'AIA' or 'the Company' or 'our' herein refers to American International Assurance Company (Bermuda) Limited.



## Memo

### 推廣優惠條款及細則

1. 新保單須於推廣期內申請及於2013年3月31日前繕發，
2. 新保單須通過冷靜期及於保費回贈時仍然維持生效，方可享有保費回贈優惠。
3. 「裕滿人生」及「裕滿人生」保障計劃(簡易版)之首月保費回贈\*之計算方法：

繳款方式	計算方法
月繳	= 月繳保費
季繳	= 季繳保費 / 3
半年繳	= 半年繳保費 / 6
年繳	= 年繳保費 / 12

\*包括新保單基本計劃之標準保費及因核保而需附加之額外保費。除推廣產品之基本計劃以外之其他附加保障保費，均不會被納入於計算此優惠之內。

4. 保費回贈金額將於2013年5月31日前存入新保單的保費儲備金戶口(FPDA)。
5. 當保費回贈至新保單的保費儲備金戶口(FPDA)後一星期內，公司會發信通知客戶有關之金額等事宜。客戶信副本亦會存放於PES 以供參考。
6. 香港之業務代表只能於所屬營業牌照境內推行此推廣計劃。

### Terms and Conditions of the Promotion Offer

1. The offer is only applicable to new policy applied during the promotion period and issued on or before 31 March 2013.
2. The new policy's cooling off period must be expired and still be in force at the time of credit.
3. Calculation of Admire Life and Admire Life (Simple Version) first month premium refund\* :

Payment mode	Premium refund calculation method
Monthly	= monthly premium
Quarterly	= quarterly premium / 3
Semi-Annual	= semi-annually premium / 6
Annual	= annual premium / 12

\* Standard premium and any extra premium applied to the specified promotion product(s) will be included into the calculation of premium refund. Apart from the basic plan of the campaign products, the premiums of all rider(s) will not be applied for calculating the premium refund amount.

4. The premium refund amount will be credited to the Future Premium Deposit Account (FPDA) on or before 31 May 2013.
5. A notification letter will be sent to customers within one week after the premium has been credited to the FPDA account. The copy of the customer letter can also be found in PES.
6. Hong Kong technical representatives can only promote this campaign within Hong Kong territory.



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## Appendix 附錄 – Partnership Distribution Corner

American International Assurance Company (Bermuda) Limited - Windows Internet Explorer

https://habd3d7capp02/IFA/en/index.html

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American International Assurance Company (Bermuda) Limited

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### IFA & Broker Corner

Products Sales Tools Resource Center e-Service Maintenance Logout

**Dedicated 24/7 Hotline.**  
**Professional support when you need it.**  
**3972 8899**

Protection Product Business Tools  
Compensation Report  
Performance Enquiry  
Policy Enquiry System  
My Customer Profile (MCP)  
**Customer Campaign Management**  
Request Policy Number

**Quick Links**

- Proposal Generation System
- Policy Enquiry System
- My Customer Profile (MCP)

**Exchange Rate of US\$**  
HK\$ 7.7578

**MCP Alerts**

» Dec 11, 2012  
2012 Dividend / Coupon accumulation interest rate revision - policy list of customers exercising Premium Offset Option. Please visit My Customer Profile to follow up.

**Leading Risk Products**  
» Key Advisor Propositions

**Investment Linked Products**  
» Key Advisor Propositions

**Universal Life**  
» Our Value Proposition

https://habd3d7capp02/IFA/appTransfer.do?appId=ccamp

Agency Corner - Campaigns - Windows Internet Explorer

http://habd3d7capp02/agency/contests/campaign/ifa\_login.do?key=MAwGxq-HQIEgtH2hnrTy/201212114t

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Agency Corner - Campaigns

Campaign 推廣活動	Campaign Period 推廣期	Upload Date 上載日期	Channel* 推廣方法	Memo 通告	Result Update / Q&A 業績報告 / 問與答	View 瀏覽
Extend the Renewal of Hospitalisation Cover to Aged 100 延長基本住院保障續保至100歲	2012-04-17 ~ 2012-11-28	2012-04-05	LG	-	-	按入
Recapture Program - Special Offer for Paid-Up Customers	2012-12-01 ~ 2013-02-28	2012-12-03	LG	-	-	按入

**Note:**  
1. All Campaigns will be shown in three months after the end of campaign period.  
2. TM: Telemarketing, LG: Lead Generation, DM: Direct Marketing  
註:  
1. 所有推廣活動的資料會在推廣期結束後三個月內被刪除。  
2. TM: 電話市場推廣; LG: 業務代表主導; DM: 郵寄推廣

http://habd3d7capp02/agency/contests/campaignSelect.do?organ\_id=0&pack=8&campCd=GCM-A1212-00&recaptureIn