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Memo

Attn: All Business Partners

From: Roy Suen

Dept.: Partnership Distribution

Date: 21 January 2022

Total page: 2

Subject: (Ref: A2022033)

2022 AIA HK & Macau Pension Commission Schedule

We are pleased to share with you the latest AIA HK & Macau Pension Commission Schedule as attached.

	ORSO	MPF		
	Corporate Business			Retail
	Employer Plan	Employer Plan	Self-Employed Person ("SEP") Plan	AIA MPF Personal Account ("MPFPA") Happy Retirement Savings Programme ("HRSP")
Application Date (for applications with all required documents that AIA received)	From 01 January 2022 to 31 December 2022			
First Year Commission	On case-by-case basis	5.0% on NAC ¹	N/A	N/A
Renewal Commission		1.0% on NAC ¹		
Trailer Fee • 1 st Year • Renewal Year		N/A		0.15% p.a. of AUM
Asset Taken Over ("ATO") Commission		1.0% on ATO ²	1.0%	N/A

	Macau PPF		Macau CPF		
	Corporate Business			Retail	
	Based on Admin Fee	Based on Contribution		CPF Individual Scheme	Macau Happy Retirement Personal Savings Program
Application Date	From 01 January 2022 to 31 December 2022				
On Admin Fee 1 st Year	200%	On case-by-case basis	N/A		
On Admin Fee 2 nd Year	75%				
On Admin Fee 3 rd Year onwards	50%				
Normal ATO	0.10% (0.05% + 0.05% additional ³)		0.5%	N/A	
FYC (NAC)	N/A		2.0%		
Trailer Fee (AUM) 1 st Year			N/A	0.2%	
Trailer Fee (AUM) Renewal Year		0.1%			
Upfront Bonus – Cash Incentive ⁴	N/A		<ul style="list-style-type: none">• MOP 100 if no ATO from Government account• MOP 200 if with ATO from Government account		N/A

Note:

* For non-standard case, the commission is subject to quotation on case-by-case basis

¹ NAC: Annualized Contribution

² ATO Commission: paid in one lump sum but subject to claw back if employer scheme leaves within first year. ATO commission will be applicable to external asset transfer only and will be payable in the next month from successful transfer in one installment.

³ Additional commission is subject to clawback schedule of 100%/80%/60%/40%/20%/0% is 1/2/3/4/5/6 years and onwards.

⁴ For Macau CPF Retail account setup only.

For enquiries, please contact your designated Account Executive.

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1

「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” or “our” herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).



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Best Regards,

Roy Suen
Chief Partnership Distribution Officer