



安盛

AXA安盛「安進儲蓄保費回贈」  
推廣計劃

# 實現夢想 和人生目標



## AXA安盛「安進儲蓄保費回贈」推廣計劃

AXA安盛深明要實現夢想和人生目標，您需要一個財富管理方案助您累積充裕資金。我們的安進儲蓄計劃能助您輕鬆累積財富，早日達成目標。現在，我們誠意為您獻上AXA安盛「安進儲蓄保費回贈」推廣計劃，讓您與摯愛家人輕鬆開展理想未來。

於**2018年10月26日至2018年12月24日**期間，成功投保全新安進儲蓄計劃而每份該基本計劃及其附加契約<sup>i</sup>（如適用）之總首年年繳保費符合下表要求，每份合資格保單即有機會獲享**高達8%的保費回贈**<sup>ii,iii</sup>。



總首年年繳保費 (港元) (或其等值外幣)	每份合資格保單之保費回贈比率	
	5年保費繳付年期	10年保費繳付年期
320,000 – 799,999	3%	3.5%
800,000 – 999,999	4%	5%
1,000,000 或以上	6%	8%

詳情請聯絡您的理財顧問、致電客戶服務熱線 **(852) 2802 2812** 或瀏覽網頁 [www.axa.com.hk](http://www.axa.com.hk)

- i. 有關基本計劃及附加契約之產品詳情，請參閱有關建議書、產品說明書及保單合約。
- ii. 有關保費回贈之詳情，請參閱本單張所載之條款及細則之第3項。
- iii. 有關本推廣計劃之詳情，請參閱本單張所載之條款及細則。

## AXA安盛「安進儲蓄保費回贈」推廣計劃之條款及細則

- AXA安盛「安進儲蓄保費回贈」推廣計劃（「推廣計劃」）由安盛保險（百慕達）有限公司（於百慕達註冊成立的有限公司）（「AXA安盛」）提供，並受下列條款及細則約束。
- 本推廣計劃只適用於當所有下列條件已符合時：
  - 於2018年10月26日至2018年12月24日期間，包括首尾兩天（「推廣期」），成功遞交全新安進儲蓄計劃的申請；及
  - 每份該安進儲蓄計劃及其附加契約（如適用）須於2018年10月26日至2018年12月29日期間（包括首尾兩天）獲成功繕發；及
  - 每份該安進儲蓄計劃及其附加契約（如適用）之總首年年繳保費達320,000港元或以上（或其等值外幣，須以下列AXA安盛釐訂之兌換表計算）。十年續保真智精選定期保險首年免繳附加契約、十年續保真智定期保險首年免繳附加契約及意外保險首年免繳附加契約之保費並不計算在適用總首年年繳保費之內；及

### 兌換表－外幣兌港元兌換價

美元	澳門元
8.0	1.0

- 不論客戶以任何方式付款，必須繳清每份該安進儲蓄計劃及其附加契約（如適用）之首13個月的到期保費。  
（符合第2a至2d項條件的安進儲蓄計劃及其附加契約（如適用）其後稱為「合資格保單」）
- 符合第2項所有條件之合資格保單將可獲享一次單次性保費回贈以作繳交合資格保單的未來保費之用。保費回贈金額的計算將等於合資格保單之總首年年繳保費乘以下表所述的相應保費回贈比率百分比（「保費回贈」）。保費回贈以合資格保單的保單貨幣計算（按上列AXA安盛釐訂之兌換表）及根據以下第6項以四捨五入方式調整至小數點後2位存入合資格保單之保費儲備金戶口（「戶口」）。

總首年年繳保費 (港元) (或其等值外幣)	每份合資格保單之保費回贈比率	
	5年保費繳付年期	10年保費繳付年期
320,000 – 799,999	3%	3.5%
800,000 – 999,999	4%	5%
1,000,000 或以上	6%	8%

- 用以計算本推廣計劃之適用總首年年繳保費金額，將以保費回贈存入戶口當時之繳費方式按如下計算：
  - 若客戶選擇以月繳方式付款，將以月繳保費乘以12計算；或
  - 若客戶選擇以半年繳方式付款，將以半年繳保費乘以2計算。
- 保費回贈將於2020年2月29日前存入戶口，有關安排須以AXA安盛最終批核為準。每份合資格保單必須於保費回贈存入戶口時仍然生效及已通過冷靜期，並且全數繳清到期保費，才符合保費回贈之獲享資格，否則保費回贈將不獲存入戶口。合資格保單之保單持有人將於保費回贈發放後，獲另函通知有關保費回贈存入戶口之詳情。
- AXA安盛(i) 以戶口中全部或部分保費回贈金額抵銷合資格保單任何的未來保費，一切以AXA安盛認為合適為準；並(ii) 不允許保單持有人從戶口中提取保費回贈金額。若合資格保單因任何原因終止，在戶口中仍未用以抵銷的保費回贈將被沒收並退回予AXA安盛。
- 在任何情況下，保費回贈均不得轉換或兌換現金，亦不得轉讓予他人。
- AXA安盛保留權利隨時更改或終止本推廣計劃（全部或部分）及/或更改本推廣計劃之有關條款及細則而不作事先通知。若本推廣計劃被更改或終止，及/或其條款及細則有任何修訂，於有關更改/終止/修訂前已於本推廣計劃下獲批核的保單及/或附加契約將不受其影響。
- 本單張只載有一般資料，並不構成任何基本計劃或附加契約的銷售建議。有關基本計劃及附加契約的條款、細則及不保事項的詳情，請參閱有關之建議書、產品說明書及保單合約。
- 保費回贈之獲享資格並非保證，有關申請須以AXA安盛最終批核為準。如有任何爭議，AXA安盛之決定將為最終及具決定性。

如閣下不願意接收AXA安盛的宣傳或直接促銷材料，敬請聯絡香港銅鑼灣勿地臣街1號時代廣場2座20樓2001室安盛保險（百慕達）有限公司（於百慕達註冊成立的有限公司）個人資料保護主任。AXA安盛會在不收任何費用的情況下確保不會將閣下納入日後之直接促銷活動中。

（只適合於香港特別行政區使用）



安盛

AXA "Wealth Advance  
Premium Rebate" Programme

# Realise your dreams & life goals



# AXA “Wealth Advance Premium Rebate” Programme

To realise your dreams and life goals, you need a wealth solution which enables you to secure sufficient funds. With Wealth Advance Savings Plan, you may achieve your savings goal easier. Therefore, we are pleased to present you the AXA “Wealth Advance Premium Rebate” Programme, to shape a promising future for you and your loved ones.

From **26 October 2018 to 24 December 2018**, if you successfully apply for the new Wealth Advance Savings Plan<sup>i</sup> with a total annualised first year premium of such basic plan and its supplements<sup>i</sup> (if applicable) as designated below, you may enjoy **up to 8% premium rebate**<sup>ii</sup> for each Eligible Policy<sup>iii</sup>.



Total Annualised First Year Premium (HKD) (or its equivalent in foreign currency)	Premium rebate rate for each Eligible Policy	
	5 years premium pay term	10 years premium pay term
320,000 – 799,999	3%	3.5%
800,000 – 999,999	4%	5%
1,000,000 or above	6%	8%

Please contact your Financial Consultant, call our Customer Service Hotline at **☎ (852) 2802 2812** or visit [www.axa.com.hk](http://www.axa.com.hk) for more details.

- i. For product details of basic plan and supplements, please refer to the relevant proposals, product brochures and policy contracts.
- ii. For details of the premium rebate, please refer to clause 3 of the terms and conditions stated in this leaflet.
- iii. For details of the Promotion, please refer to the relevant terms and conditions stated in this leaflet.

## Terms and Conditions of AXA “Wealth Advance Premium Rebate” Programme

- AXA “Wealth Advance Premium Rebate” Programme (the “Promotion”) is offered by AXA China Region Insurance Company (Bermuda) Limited (Incorporated in Bermuda with limited liability) (“AXA”), subject to the following terms and conditions.
- This Promotion is only applicable if all of the following requirements are satisfied:
  - Customers successfully submit the applications for the new Wealth Advance Savings Plan during the period from 26 October 2018 to 24 December 2018, both dates inclusive (the “Promotion Period”); and
  - Every such Wealth Advance Savings Plan and its supplements (if applicable) must be successfully issued during the period from 26 October 2018 to 29 December 2018, both dates inclusive; and
  - Every such Wealth Advance Savings Plan and its supplements (if applicable) has a total annualised first year premium of HKD320,000 or above (or its equivalent in foreign currency based on AXA’s Conversion Table below). The calculation of the applicable total annualised first year premium does not include the premium of Smart Elite 10-year Term First Year Free Supplement, Smart 10-year Term First Year Free Supplement and Accident Protector First (1st) Year Free Supplement; and

### Conversion Table – Exchange rate of foreign currencies against HKD

USD	MOP
8.0	1.0

- For all payment modes, all premiums for the first 13 months due under every such Wealth Advance Savings Plan and its supplements (if applicable) must be fully paid.  
(Wealth Advance Savings Plan and its supplements (if applicable) satisfying the requirements as set out in clauses 2a – 2d above hereafter referred to as “Eligible Policy”)
- An Eligible Policy that has met all requirements as set out in clause 2 will be entitled to a one-off premium rebate intended for settlement of future premium of the Eligible Policy. The amount of premium rebate will be calculated by multiplying the annualised first year premium of the Eligible Policy by the applicable percentage of premium rebate rate as shown in the table below (“Premium Rebate”). The Premium Rebate shall be rounded to the nearest 2 decimal places according to the policy currency (based on AXA’s Conversion Table above) of the Eligible Policy, and will be credited to the future premium deposit account (the “Account”) of the Eligible Policy pursuant to clause 6 below.

Total Annualised First Year Premium (HKD) (or its equivalent in foreign currency)	Premium rebate rate for each Eligible Policy	
	5 years premium pay term	10 years premium pay term
320,000 – 799,999	3%	3.5%
800,000 – 999,999	4%	5%
1,000,000 or above	6%	8%

- The calculation of the applicable total annualised first year premium under the Promotion will be determined by the payment mode as at the time when the Premium Rebate is credited to the Account as follows:
  - For monthly payment mode, by multiplying the monthly premium payment amount by 12; or
  - For semi-annual payment mode, by multiplying the semi-annual premium payment amount by 2.
- The Premium Rebate will be credited to the Account before 29 February 2020 and such arrangement is subject to AXA’s approval. To be eligible for the Premium Rebate, the Eligible Policy must be in force and has passed its cooling-off period at the time when the Premium Rebate is credited to the Account. All premiums due under the Eligible Policy must be fully paid at the time when the Premium Rebate is credited to the Account, failing which the Premium Rebate will not be credited to the Account. Policy owner of the Eligible Policy will receive a notification letter by mail upon the credit of the Premium Rebate into the Account. Such notification letter will set out the Premium Rebate credit details.
- AXA (i) applies all or part of the Premium Rebate (as the case may be) in the Account to offset any part of future premium of the Eligible Policy from time to time as AXA deems appropriate; and (ii) restricts withdrawal of Premium Rebate from the Account. If the Eligible Policy shall terminate for whatever reasons, the Premium Rebate in the Account not yet used to settle future premium will be forfeited and refunded to AXA.
- The Premium Rebate is non-transferable and cannot be exchanged or redeemed for cash under any circumstances.
- AXA reserves the right to alter or terminate the Promotion (in whole or in part) and/or amend the relevant terms and conditions of the Promotion at any time without prior notice. An application for any policy and/or supplement under the Promotion previously approved will not be affected by subsequent alteration or termination of the Promotion and/or amendments to its terms and conditions.
- This leaflet contains general information only. It does not constitute any offer for a basic plan or supplement. For detailed terms, conditions and exclusions of the relevant basic plan and supplements, please refer to the relevant proposals, product brochures and policy contracts.
- The eligibility of the Premium Rebate is not guaranteed. Such application is subject to AXA’s approval. In case of any dispute, the decision of AXA shall be final and conclusive.

If you do not wish to receive promotional or direct marketing materials from AXA, please inform the Data Privacy Officer, AXA China Region Insurance Company (Bermuda) Limited (Incorporated in Bermuda with limited liability), Suite 2001, 20/F, Tower Two, Times Square, 1 Matheson Street, Causeway Bay, Hong Kong. AXA shall, without charge to you, ensure that you are not included in future direct marketing activities.

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