



AIA Hong Kong

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734 King's Road
Quarry Bay
Hong Kong

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Memo

Attn: All EDDAs & Honorable Advisors /
EDDs / PSDDs / SDDs / DDs / MICs /
Agency Leaders / Financial Planners
(Hong Kong) From: Jim Jan Zen

Co/Dept: Mr. Alger Fung / Mr. Louie Ho /
All Department Heads / All ABDD
Executives / All BTDD Members Dept: Management Team

Date: 5 June 2023 Total Page: 5



Subject: (A230623) Reminder on Proper Use of Social Media
提示：正確使用社群媒體

公司一向支持財務策劃顧問在合規的情況下使用社群媒體拓展商機。近日，公司留意到有個別財務策劃顧問不恰當使用社群媒體平台或於平台上作出不恰當言論/回應。

公司現提醒所有營業團隊及財務策劃顧問，無論以財務策劃顧問身份或個人身份在社群媒體發表的言論、轉載或評論，無論內容屬公開與否，均代表或被視作為代表友邦保險的品牌形象；這包括但不限於發佈工作及保險行業相關訊息、就友邦相關議題發表評論、參與友邦主辦的社群媒體活動、招攬業務、表明自身與友邦的關係、或自行發佈個人社群媒體內容。

當大家以財務策劃顧問的身分發表言論時，請注意以下各點：

- 時刻遵守所有適用的法例、法規及倫理規範
- 抱持誠實、準確及相互尊重的態度，不應張貼、發表或散播任何帶有欺凌、仇恨、暴力、色情、威脅、人身攻擊或歧視等不恰當內容，並請小心討論可能帶有煽動性的話題
- 保護並提高 AIA 的品牌價值，用您的最佳判斷去預想一下他人對您的言論/發佈資訊可能會有的反應，包括對 AIA 的品牌可能造成的負面影響
- 當業務與個人生活混在一起時要有所覺察。當您在線上時，您的個人與業務角色可能相互交疊。切記，您不應該透露任何 AIA 的非公開資訊(包括機密資訊)，並請注意在線上與 AIA 利益相違背的公開姿態出現可能會導致衝突
- 張貼正確信息及運用最佳判斷
- 切勿於社群媒體平台與任何人士發生爭拗

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財務策劃顧問切記要仔細權衡及考慮，保持應有的專業操守及態度，並嚴格遵守《社群媒體政策與準則（業務員）》。我們亦要求所有財務策劃顧問謹慎地管理及使用其個人社群媒體帳戶，公司訂有清晰處理機制，所有涉及違反社群媒體相關規定的行徑，將會交予公司市場操守委員會（“MCC”）進行審理。查明屬實，相關財務策劃顧問或會受到懲處，罰則會因應違規嚴重程度而定。

財務策劃顧問可登入友邦營業員專頁，閱讀及了解公司《社群媒體政策與準則（業務員）》。

路徑：友邦營業員專頁 > 指南 > General Manuals > 社群媒體政策與準則（業務員）

正確使用社群媒體極其重要，謹此促請大家的高度重視。

詹振聲
首席營業官
友邦香港及澳門

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公司一向支持财务策划顾问在合规的情况下使用社群媒体拓展商机。近日，公司留意到有个别财务策划顾问不恰当使用社群媒体平台或於平台上作出不恰当言论/回应。

公司现提醒所有营业团队及财务策划顾问，无论以财务策划顾问身份或个人身份在社群媒体发表的言论、转载或评论，无论内容属公开与否，均代表或被视作为代表友邦保险的品牌形象；这包括但不限于发布工作相关讯息、就友邦相关议题发表评论、参与友邦主办的社群媒体活动、招揽业务、表明自身与友邦的关系、或自行发布个人社群媒体内容。

当大家以财务策划顾问的身分发表言论时，请注意以下各点：

- 时刻遵守所有适用的法例、法规及伦理规范
- 抱持诚实、准确及相互尊重的态度，不应张贴、发表或散播任何带有欺凌、仇恨、暴力、色情、威胁、人身攻击或歧视等不恰当内容，并请小心讨论可能带有煽动性的话题
- 保护并提高AIA的品牌价值，用您的最佳判断去预想一下他人对您的言论/发布资讯可能会有反应，包括对AIA的品牌可能造成的负面影响
- 当业务与个人生活混在一起时要有所觉察。当您在线上时，您的个人与业务角色可能相互交叠。切记，您不应该透露任何AIA的非公开资讯（包括机密资讯），并注意在线上与AIA利益相违背的公开姿态出现可能会导致冲突
- 张贴正确信息及运用最佳判断
- 切勿於社群媒体平台与任何人士发生争拗

财务策划顾问切记要仔细权衡及考虑，保持应有的专业操守及态度，并严格遵守《社群媒体政策与准则（业务员）》。我们亦要求所有财务策划顾问谨慎地管理及使用其个人社群媒体帐户，公司订有清晰处理机制，所有涉及违反社群媒体相关规定的行径，将会交予公司市场操守委员会（“MCC”）进行审理。查明属实，相关财务策划顾问或会受到惩处，罚则会因应违规严重程度而定。

财务策划顾问可登入友邦营业员专页，阅读及了解公司《社群媒体政策与准则（业务员）》。

路径：友邦营业员专页 > 指南 > General Manuals > 社群媒体政策与准则（业务员）

正确使用社群媒体极其重要，谨此促请大家的高度重视。

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At AIA, we always support our financial planners to leverage on social media platforms to extend their business opportunities in a compliant manner. We recently observed there are improper uses or comments on social media platforms by individual financial planners.

The Company would like to remind all agencies and financial planners that when you post, repost or comment on social media as financial planners or in your personal capacity, whether the content is public or not, it represents or is deemed to represent the AIA brand. This includes work-related posting as our financial planner; commenting on a topic related to AIA and the insurance industry; participating in any AIA-sponsored digital platform; soliciting business opportunities as a representative of AIA; identifying your connection or affiliation with AIA; or creating personal social media posts.

Financial planners should also refrain from posting or publishing any inappropriate content on social media or other communication platforms (e.g. content that contains bullying, hatred, violence, pornography, threats, or discrimination)

When you are using your social media platforms in the capacity as an AIA's financial planner:

- Comply with all applicable laws, rules and ethical regulations at all times
- Be truthful, accurate and respectful; should refrain from posting or publishing any inappropriate content on social media or other communication platforms (e.g. content that contains bullying, hatred, violence, pornography, threats, or discrimination), and always be careful when discussing sensitive topics that may result in receiving inflammatory remarks
- Protect and enhance the value of AIA's brand; use your best judgment to anticipate peoples' reaction on the comments / information your posted, including the potential adverse impact on AIA's brand
- Be conscious when mixing your business and personal lives. When you are online, your personal and business identity are likely to be perceived as the same person. Remember that you should not disclose any non-public information of AIA (including confidential information), and be aware that taking public positions online that are opposed to AIA's interests might cause conflicts
- Post accurate messages and exercise good judgment
- Never argue on social media platform

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Financial planners should maintain their professional image, and strictly adhere to our “Social Media Policy and Guideline (For Agents)” when using social media. We also ask all financial planners to diligently manage and use their social media accounts. The company will appropriately handle all non-compliance cases by escalating them 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.

Financial planners can login to Agency Corner to read and understand the Company’s “Social Media Policy and Guidelines (Agents)”.

Path: Agency Corner > Manuals > General Manuals > Social Media Policy and Guidelines (Agents)

We urge everyone to be vigilant on the correct procedures of using social media.

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