

Professional Liability – AIA Agents Protector The User Guide for Electronic Payment Platform

For first time enrolment - how to complete the application

Access to the e-Platform

Leader will receive an email from AIA after his new Financial Planner gets an Agent Code from AIA. The link and QR Code for access to the e-Platform for application and payment for the AIA Agents Protector will be included in the email.

Compatibility of the Platform

This Platform only works on:

Device : Smartphone or Tablet

Suggested Operating System: iOS or Android

Suggested Browser: Safari or Google Chrome

The Payment Gateway is only available for:

Credit Card: Visa or Master

Access to the AIA Agents Protector Video

Web address: <https://www.youtube.com/watch?v=AiCuUyBA-UE&feature=youtu.be>

1

- i. Select your preferred language to be displayed in the application. However, the information you input must still be in **English**.
- ii. Select your type of employment at AIA – **Financial Planner / Intern**.
- iii. Select your contract date with AIA

Example:



	Enroll on	Contract with AIA on	Policy Effective Date	Policy Expiring Date
For Inforce Financial Planner	April 01, 2020	Jan 01, 1990	May 01, 2020	Sep 30, 2020
For New Contracted Financial Planner	-	April 01, 2020	April 01, 2020	Sep 30, 2020

- iv. Click “Next”.

The screenshot shows the AIG application interface. At the top is the AIG logo. Below it are two buttons for language selection: "English" (highlighted in blue) and "中文". The question "Are you a Financial Planner or Intern?" is followed by a dropdown menu currently set to "Financial Planner". Below this is the "Contract Date" field, which is set to "April 2020" and includes a calendar icon. At the bottom is a large blue "Next" button.

2 (This page is not applicable for NEW Financial Planners who contract with AIA in less than 3 months before or after the date of application)

- i. If your answer is “Yes” in any of the three questions as above, the application will be suspended and please provide necessary information to AIG for review.
- ii. Please call AIG Enquiry hotline: 3666 7012 (Mon – Fri 9:00am - 5:30pm) and leave your contact details including your
 - 1) Full Name on HKID card
 - 2) Agent code
 - 3) Contact Telephone number
 - 4) Email address
- iii. Our underwriter will contact you within 2 working days and advise what additional information is needed.
- iv. Please send the required information to our designated email account.
- v. Upon satisfactory review of the information, a passcode will be sent to you by email to proceed your application.

<div style="text-align: center;"></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p>Question 1</p><p>Are you aware, after full enquiry, of any form of client complaint (brought by the client, or on their behalf by a regulator)?</p><p style="text-align: center;"><input type="text" value="Yes"/></p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p>Question 2</p><p>Has any claim been brought against you during the last 5 years?</p><p style="text-align: center;"><input type="text" value="Yes"/></p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p>Question 3</p><p>Do you after full enquiry have any knowledge of any act, omission, event or circumstance which could give rise to a claim?</p><p style="text-align: center;"><input type="text" value="Yes"/></p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p>Declaration</p><p>I hereby certify and declare that the above declaration is true and correct to my best information, belief and knowledge. I understand that any incorrect information or non-disclosure will affect my coverage and benefits.</p></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p><input checked="" type="checkbox"/> Confirm and Agree</p></div> <div style="text-align: center; margin-bottom: 5px;"><p>Next</p></div> <div style="text-align: center;"><p>Back</p></div>	<div style="text-align: center;"></div> <ol style="list-style-type: none">1. If your answer is “Yes” in any of the three questions as above, the application will be suspended and please provide necessary information to AIG for review.2. Please call AIG Enquiry hotline: 3666 7012 (Mon – Fri 9:00am - 5:30pm) and leave your contact details including your<ul style="list-style-type: none">i. Full Name on HKID cardii. Agent codeiii. Contact telephone numberiv. Email address3. Our underwriter will contact you within 2 working days and advise what additional information is needed.4. Please send the required information to our designated email account.5. Upon satisfactory review of the information, a passcode will be sent to you by email to proceed your application. <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"><p>Passcode</p></div> <div style="text-align: center; margin-bottom: 5px;"><p>Next</p></div> <div style="text-align: center;"><p>Back</p></div>
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3

- i. Enter your name in English (must be the same as the name shown on your identity card), and please put your **SURNAME at the FRONT.**
- ii. Enter your **AIA Agent Code.**
- iii. Fill in your **Agency Code** (please check with the secretary or leader of your team if you do not know).
- iv. Fill in your **Agency Name** (please check with the secretary or leader of your team if you do not know).
- v. Fill in your **Area Code** (please check with the secretary or leader of your team if you do not know).



▼ Insured Personal Information

Name (same as ID Card)

Agent Code

Agency Code

Agency Name

Area Code

- vi. Provide your **AIA Email** (@aia.com.hk/aia.com.mo) **and / or Personal Email**. This is very important that this is an email which you **REGULARLY USE**, as AIG will send Certificate of Insurance and Payment Reminder to this email address.
- vii. Provide your **mobile number**. This is also very important as this will serve as the back-up contact method to email.
- viii. Inception Date is automatically generated by the Platform. For NEW Financial Planners, application date within 3 months of Contract Date, Inception Date will be the same as Contract Date. For Financial Planners joined AIA for more than 3 months then apply, Inception Date will be the first day of next month, e.g. Contract Date is Jan 1st, enroll on Apr 1st and Inception Date will be May 1st.
- ix. Enter your **home address**.
- x. Click "Next".

AIA Company Email

e.g. abc @aia.com.hk

Personal Email

Personal Email (Optional)

Mobile Phone

Mobile Phone

Inception Date

APR 2020

Address

Room and Floor

Building

Estate

Street

Territory

District

Next

Back

4

- i. You may view the coverage summary by clicking “Coverage”. Then, you may choose your preferred option and proceed to next page by clicking the “**Select**” button under each option.

AIG

Plan

Financial Planner HK\$ 294.00

➤ Coverage (Click here for details)

Select

Back

5

- i. Verify information which you have input in this application and click “Correction” if you need to revise your application.
- ii. Click “Confirm and Agree” after you have read and agreed with the declaration.
- iii. Click to confirm the “Personal Information Collection Statement”.
- iv. Click “Confirm for Payment” to make payment.

Details Preview	
Reference No.	020055/00
Contract Date	2020-04-01
Effective Date	2020-04-01
Expiration Date	2020-09-30
Plan	Financial Planner
Premium	HK\$ 294.00 (Including IA Levy)

Insured Details	
Name (same as ID Card)	
Agent Code	
Agency Code	
Agency Name	
Area Code	
AIA Company Email	
Mobile Phone	
Home Address	
District	
Territory	

Declaration	
<p>1. For the purpose of my participation in "AIA Agents Protection Insurance" plan, I hereby authorize AIA International Limited ("AIA") and Life Underwriters & Sales Executive Board (HK) Limited ("LUSEB") to collect, store and use my personal data (as defined in the Personal Data (Privacy) Ordinance) and transfer my personal data to AIG Insurance Hong Kong Limited ("AIG") for the purpose of applying for the coverage and also for processing and handling of the policy renewal and any claim on my behalf.</p> <p>2. AIG is permitted to collect, store and use my personal data as provided by me on this form (including electronically) or otherwise for the purpose of or in connection with my application for coverage under AIG's "AIA Agents Protector Insurance" plans. The Personal Information Collection Statement issued by AIG is available for download at its website (www.aig.com.hk) and/or upon request.</p> <p>3. AIG is permitted to release details of any claim or circumstance reported by me or otherwise for the purpose of or in connection with my claim under AIG's "AIA Agents Protector Insurance" plans.</p> <p>4. This policy will be automatically renewed on annual basis upon expiry and will come into effect upon full premium payment unless prior written instruction for cancellation of policy is given by me.</p> <p>5. The policyholder of the AIA Agents Protector Insurance is LUSEB, and I have agreed to comply with the terms of the Agents Protector Insurance subject to change from time to time.</p> <p>6. I confirm,</p> <ol style="list-style-type: none">i. I am not aware, after full enquiry, of any form of client complaint (brought by the client, or on their behalf by a regulator), andii. There have never been any claims brought against me during the last 5 years, andiii. I do not after full enquiry have any knowledge of any act, omission, event or circumstance which could give rise to a claim <p>Or, if any of the above is true, I have been given permission by AIG HK to proceed with purchasing this policy.</p> <p>7. All information, answers to all questions, all particulars and statements given in the application is true and correct to my best information, belief and knowledge. I understand that any incorrect information or non-disclosure will affect my coverage and benefits.</p>	

Personal Information Collection Statement

In relation to the personal data collected in the application form, I agree and acknowledge that:

- The personal data requested in the application is necessary for AIG Insurance Hong Kong Limited ("AIG HK") to process this application and any such data not provided may mean this application cannot be processed.
- The personal data collected in this form may be used by AIG HK for the purposes stated in its Data Privacy Policy, which include underwriting and administering the insurance policy being applied for (including obtaining reinsurance, underwriting renewals, data matching, claim processing, investigation, payment and subrogation and any related purposes).
- AIG HK may transfer the personal data to the following classes of persons (whether based in Hong Kong or overseas) for the purposes identified in (2) above:
 - Third parties providing services related to the administration of my/our policy (including reinsurance);
 - Financial institutions for the purpose of processing this application and obtaining policy payments;
 - In the event of a claim, loss adjusters, assessors, third party administrators, emergency providers, legal services providers, retailers, medical providers and travel carriers;
 - Another member of the AIG group (for all of the purposes stated in (2) in any country; or
 - Other parties referred to in AIG HK's Data Privacy Policy for the purposes stated therein.
- I may gain access to, or request correction of my personal data (in both cases, subject to a reasonable fee), by writing to the Privacy Compliance Officer of AIG Insurance Hong Kong Limited at GPO Box 456 or cs.hk@aig.com. The full version of AIG HK's Data Privacy Policy can be found at www.aig.com.hk.

Confirm and Agree

I have read and understood the **Personal Information Collection Statement** and agree to be bound by the same.

Confirm for Payment

Correction

6

- Select your card type on clicking on the logo of Visa / Master card.

Payment Details

Secure Authenticated Merchant :

You are now connected to a secure payment site operated by PayDollar.com . Your payment details will be securely transmitted Bank, Card and Payment Companies for transaction authorisation up to 256-bit SSL encryption.

AIG Insurance Hong Kong Limited



Select your payment method by clicking on the logo below:

Pay By Credit and Debit Card

Pay By Digital Wallet

Tell Me More

- ii. The Applicant needs NOT be the cardholder of the credit card, given that you have obtained consent of the cardholder for settling the payment using her / his card. You will be directed to the confirmation page upon completion of the transaction, and a confirmation email with Certificate of Insurance, FAQ, and Premium Schedule, will be sent to you.
- iii. After finish, please keep the Certificate of Insurance safely.

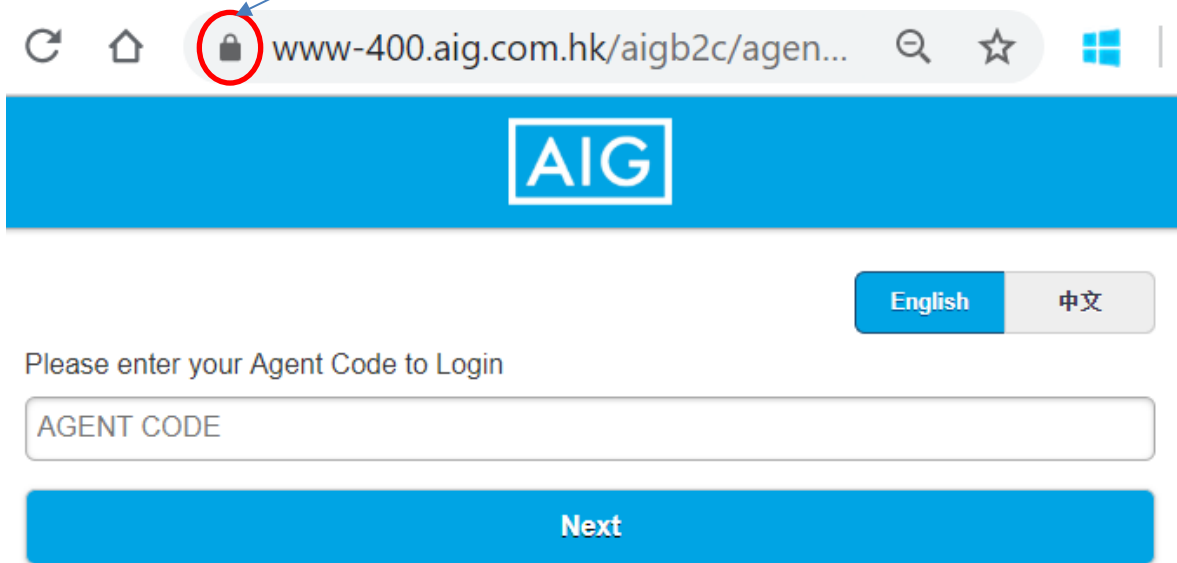
 <div style="text-align: center; margin-top: 20px;">Transaction Information</div> <p>Merchant Name : AIG Insurance Hong Kong Limited Merchant Reference No. : WWBVTY161700 Transaction Amount : HKD 392.00 Transaction IP Address : 165.225.112.149</p> <p style="text-align: center;">Please fill in the card information:</p> <p>Card Number : <input type="text"/></p> <p>Expiry Date (mm/yyyy) : -- ▾ ---- ▾</p> <p>Name as shown on card : <input type="text"/></p> <p>Card Verification Number : <input type="text"/> </p> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> Submit Cancel </div> <p style="font-size: small; margin-top: 20px;">Note: As certain card-issuing banks might not yet be ready for Internet transaction, please contact your card-issuing bank for any problems in using your card for transactions via PayDollar.</p> <p style="font-size: x-small; margin-top: 5px;">* If you have already registered Verified By VISA, you will be required to provide your corresponding password after confirmation as requested by your issuing bank.</p>	<div style="background-color: #00AEEF; color: white; padding: 5px; text-align: center; font-weight: bold; font-size: 1.2em;">AIG</div> <div style="text-align: right; margin-top: 10px;"> English 中文 </div> <p style="text-align: center; margin-top: 20px;">We have successfully received your application and payment.</p> <p style="text-align: center;">Your Certificate number is 020039/0.</p> <p style="text-align: center;">You will soon receive the certificate electronically via email.</p> <p style="text-align: center;">Please kindly be reminded to keep the Certificate of Insurance safely.</p> <p style="font-size: small; text-align: center;">* Please note successful application is subject to underwriting and compliance review. AIG will contact you if the enrollment is not successful.</p> <div style="text-align: center; margin-top: 20px;"> Exit </div>
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For settling overdue renewal payment

- i. You only need to use the Platform for settling renewal premium if AIA is unable to debit premium from your payroll account.
- ii. You will receive an email / SMS notification if you have outstanding renewal payment. And this email / SMS will contain dedicated link which directs to the Platform.

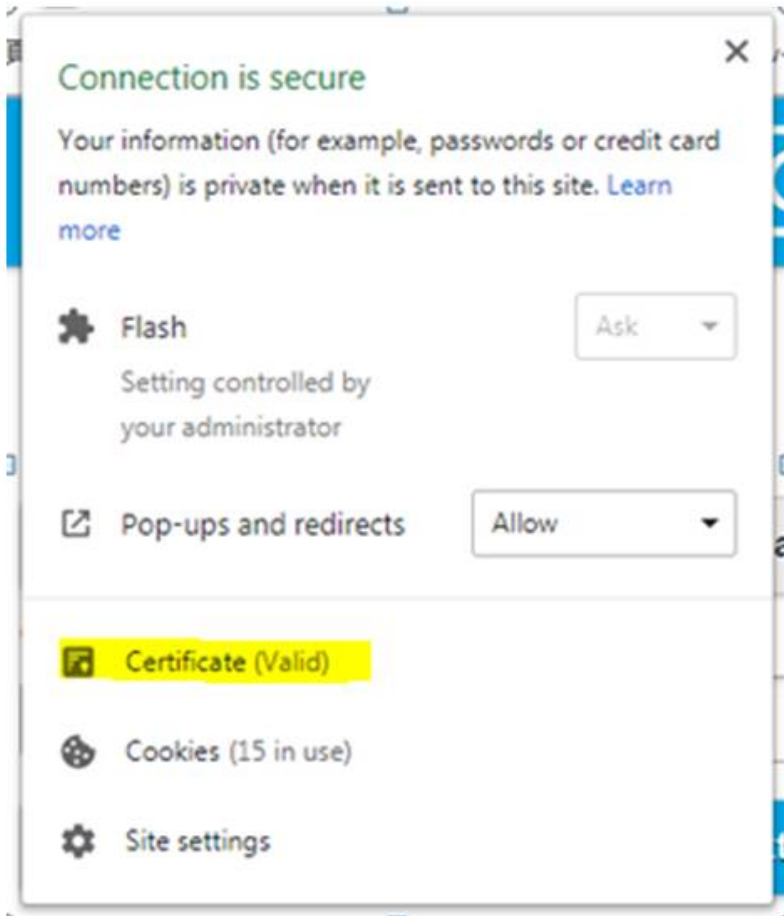
* please ensure the site address start with <https://www-400.aig.com.hk/>

* please be aware of the following grey lock icon indicates a standard certificate.
(Important: it appears to be unsecure if a website doesn't have an encryption icon. Do not enter any personal or credit card information on a web page that isn't encrypted)

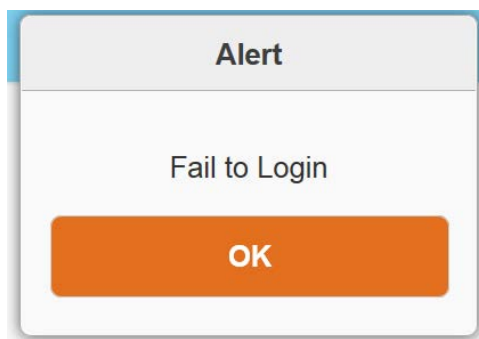


The screenshot shows a web browser interface. The address bar contains the URL www-400.aig.com.hk/aigb2c/agen.... A grey lock icon in the address bar is circled in red, with a blue arrow pointing to it from the text above. Below the address bar is a blue header bar with the AIG logo. To the right of the logo are two buttons: 'English' (highlighted in blue) and '中文' (grey). Below the header is the text 'Please enter your Agent Code to Login'. Underneath is a text input field containing the placeholder text 'AGENT CODE'. At the bottom of the form is a large blue button labeled 'Next'.

www-400.aig.com.hk/aigb2c/agents/View/AgentI



- iii. This link is UNIQUE for EACH INSURED Agent. You can only login with your own agent code on this page, and alert message will pop up if you enter your agent code incorrectly.



- iv. After you successfully login with your own agent code, your personal information will be displayed in the following page, please check carefully before you go to the next page.

Insured Personal Information

Name (same as ID Card)

Agent Code

Agency Code

Agency Name

Area Code

AIA Company Email
 @aia.com.hk

Personal Email

Mobile Phone

Address

Next

- v. Please proceed to next page by clicking the “Select” button

AIG

Plan

Financial Planner HK\$ 588.00

Coverage (Click here for details)

Select

Back

- vi. Click “Confirm and Agree” after you have read and agreed with the declaration.
- vii. Click to confirm the “Personal Information Collection Statement.
- viii. Click “Confirm for Payment” to make payment.

▼ **Details Preview**

Reference No.
 Contract Date
 Effective Date
 Expiration Date
 Plan
 Premium

▼ **Insured Details**

Name (same as ID Card)
 Agent Code
 Agency Code
 Agency Name
 Area Code
 AIA Company Email
 Mobile Phone

▶ **Declaration**

▶ **Personal Information Collection Statement**

Confirm and Agree

I have read and understood the [Personal Information Collection Statement](#) and agree to be bound by the same.

Confirm for Payment

Back

- ix. Please select your credit card type on clicking on the logo of Visa / Master card.


Payment Details

🔒 Secure Authenticated Merchant :
 You are now connected to a secure payment site operated by PayDollar.com . Your payment details will be securely transmitted Bank, Card and Payment Companies for transaction authorisation up to 256-bit SSL encryption.

AIG Insurance Hong Kong Limited

Select your payment method by clicking on the logo below:

Pay By Credit and Debit Card




Pay By Digital Wallet

▶

VISA Checkout

Tell Me More

- x. You need NOT be the cardholder of the credit card, given that you have obtained consent of the cardholder for settling the payment using her / his card. You will be directed to the confirmation page upon completion of the transaction, and a confirmation email with Certificate of Insurance will be sent to you.

<p>VISA Verified by VISA</p> <p>Transaction Information</p> <p>Merchant Name : AIG Insurance Hong Kong Limited Merchant Reference No. : WWBVTY161700 Transaction Amount : HKD 392.00 Transaction IP Address : 165.225.112.149</p> <p>Please fill in the card information:</p> <p>Card Number : <input type="text"/></p> <p>Expiry Date (mm/yyyy) : -- ▾ ---- ▾</p> <p>Name as shown on card : <input type="text"/></p> <p>Card Verification Number : <input type="text"/> </p> <p>Submit Cancel</p> <p><small>Note: As certain card-issuing banks might not yet be ready for Internet transaction, please contact your card-issuing bank for any problems in using your card for transactions via PayDollar.</small></p> <p><small>* If you have already registered Verified By VISA, you will be required to provide your corresponding password after confirmation as requested by your issuing bank.</small></p>	<p>AIG</p> <p>English 中文</p> <p>We have successfully received your application and payment.</p> <p>Your Certificate number is 020039/0.</p> <p>You will soon receive the certificate electronically via email.</p> <p>Please kindly be reminded to keep the Certificate of Insurance safely.</p> <p>* Please note successful application is subject to underwriting and compliance review. AIG will contact you if the enrollment is not successful.</p> <p>Exit</p>
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