

30 March 2022

<Barcode>

<Salutation> <Client's Last name> <Client's First name> / <Company Name>
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Dear <Salutation> <Client's Last name> / <Company Name>

OnePlatform will serve you best!

We are glad to share with you about our latest Group's development. The filing of a proxy statement with the U.S. Securities & Exchange Commission has paved our way to listing on NASDAQ. To get ourselves ready for this next exciting stage, we have decided, starting from April 2022, to migrate our life insurance and MPF businesses from CFS to OWM¹. It means that your new insurance and MPF business through us will be conducted with OWM on or after 1st April 2022.

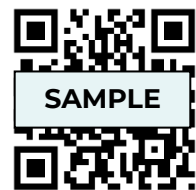
OnePlatform is a pioneering platform that gives our customers the best service and the broadest range of products. We are confident that the consolidation of our businesses into one easy-to-use platform would provide you with the most professional service and satisfy your future insurance and MPF needs (and more!). The migration neither impose any fee on you nor affect our level of customer service. We look forward to welcoming you to become a customer of OWM, and please read the two simple documents we have enclosed in Appendices I and II.²

ACTION NOW!

To enjoy and experience the comprehensive services under OnePlatform right away, you are cordially invited to transfer the servicing right of your existing Life Insurance Policies and/or MPF Schemes from CFS to OWM. The procedure is as simple as providing a customer instruction. The required forms can be downloaded from the QR Code here. Please complete the forms and return them to:

Trust Tower, 68 Johnston Road, Wan Chai, Hong Kong

ATTENTION: Holders of policies in Investment Linked Assurance Schemes of Zurich International Life Limited and/or FWD Life Insurance Company (Bermuda) Limited should note that if servicing right of these policies was transferred to OWM, the Discretionary Portfolio Management Service will not be available. Please consult your financial consultant before giving your servicing right transfer instruction.



¹ Specifically, Convoy Financial Services Limited ("CFS", Insurance Authority License No. FB1360 and MPF Registration No. IC000105) will migrate its insurance and MPF businesses to OnePlatform Wealth Management Limited ("OWM", Insurance Authority License No. FB1452 and MPF Registration No. IC000579).

² Notice of re assignment and the terms and conditions of OWM account.

We appreciate your confidence in us. In order to show how much we appreciate your support, we are offering a gift of HKD 100 ParknShop Voucher to eligible customers for the submission to OWM of their duly signed and executed documents of Instruction to Change Servicing Rights of Insurance Intermediary and their agreement to receive direct marketing from OnePlatform Holdings Limited and its associated companies.³

By signing and returning the documents on the Instruction to Change Servicing Rights of Insurance Intermediary, you acknowledge that you have read and agreed to be bound by the terms and conditions enclosed under the link and QR code below.

Terms & Conditions on the gift of "HK\$100 ParknShop Voucher"

Please click the link below or scan the QR code here to see terms and conditions.

<https://www.oneplatform.com.hk/incentivetandc.htm>



Our aim has always been to provide you with the highest level of customer services and the widest range of financial products. OnePlatform will deliver on that promise!

If you have any enquiries, please contact our Dedicated Hotline at +852 3601 8900 or your financial consultant. We greatly appreciate your continued support.

Yours sincerely
OnePlatform Holdings Limited
Convoy Financial Services Limited and
Convoy Financial Solutions Limited

This is a computer-generated print-out and no signature is required.

³ Terms and conditions applied.

關於環一財富管理有限公司於二零二二年三月三十日發出的函件之中文譯本
(此中文譯本僅供參考之用，如果中英文版本之間有任何衝突或差異，應以英文版本為準，並被視為正確版本。)

親愛的客戶：

環一 (OnePlatform) 平台 優越為您

我們很高興與您分享集團最新發展！集團早前向美國證券交易委員會遞交股東委託書，並正在邁向 NASDAQ 上市新里程。為迎接令人振奮的全新階段，由 2022 年 4 月 1 日開始，我們會將旗下的人壽保險和強積金業務，由康宏理財轉移至環一財富管理。⁴ 在此之後，若您透過我們選購新保單或強積金產品，有關程序將於環一財富管理完成。

環一平台是一個屢屢創新的平台，為客戶提供最佳服務之餘，亦匯集最廣泛多元的理財產品以滿足客戶於不同人生階段的需要。隨著我們所有業務均整合至此簡便易用的平台，我們深信環一能為您提供最專業的服務，滿足您未來所有保險、強積金，以至其他更多範疇的需要。今次轉移不會對我們的服務有任何影響，也不會產生額外費用。我們摯誠歡迎您成為環一財富管理的客戶，敬請細閱我們在附錄一和附錄二奉上的兩份簡單文件。⁵

立即行動！

為能盡早享用及體驗環一平台全面的優質服務，我們現誠邀您將現有的人壽保險及/或強積金計劃之服務權由康宏理財轉移至環一財富管理。手續非常簡單，只要提交書面通知即可。您只需掃描此二維碼即可下載所需表格，請填妥後寄回以下地址：

香港灣仔莊士敦道 68 號互信大廈

注意：蘇黎世國際人壽保險有限公司及/或富衛人壽保險（百慕達）有限公司投資相連壽險計劃之保單持有人請注意，若將此類保單的服務權轉移至環一財富管理，投資組合管理服務將未能提供。請於提交服務權轉移申請前諮詢您的理財顧問。



我們感謝閣下對我們的信任。為了向您表達我們多麼感謝您一直以來的支持，閣下只要向環一財富管理遞交已簽署的更改保險中介人服務權之相關文件，並同意接收環一控股有限公司以及其相關公司的優惠、促銷、折扣或任何類似的訊息，我們便誠意為您送上港幣 100 元的百佳禮券。

簽署並遞交更改保險中介人服務權的相關文件，即表示您同意並接受以下連結及二維碼內有關條款及細則約束。

⁴ 具體而言，康宏理財服務有限公司(簡稱「康宏理財」，香港保險業監管局牌照號碼：FB1360、強積金註冊編號：IC000105) 會將旗下新業務轉移至環一財富管理有限公司(簡稱「環一財富管理」，香港保險業監管局牌照號碼：FB1452、強積金註冊編號：IC000579)。

⁵ 轉移通知書及環一財富理客戶的條款和細則。

「港幣 100 元百佳禮券」的條款及細則

請點擊以下連結或掃描此二維碼了解條款及細則。

<https://www.oneplatform.com.hk/incentivetandc.htm>



我們的目標始終如一，就是為您提供最出類拔萃的客戶服務，以至提供最廣泛多元的理財產品。環一平台定必信守承諾，力臻至善！

如有任何查詢，歡迎隨時致電我們的客戶專線：+852 3601 8900，或與您的理財顧問聯絡。我們衷心感謝您一直以來的支持。

環一控股有限公司
康宏理財服務有限公司
康宏理財策劃有限公司 謹啟

二零二二年三月三十日

本函為電腦編印文件，毋須簽署。