



# Brand Guidelines for Financial Advisers

[aiavitality.com.au](http://aiavitality.com.au)

**AIA** *Vitality*



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# Using the AIA Vitality brand

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AIA Vitality is a joint venture between AIA Australia's parent company, AIA Company Limited and Discovery Limited. The Australian AIA Vitality program must be operated, administered and presented in accordance with contractual terms defined by the joint venture parties. Discovery Limited also provides strict brand guidelines that must be adhered to. Accordingly, these guidelines prescribe how the AIA Vitality program should be represented by our Australian business partners.

AIA Australia is committed to the long-term success of AIA Vitality. We look forward to working with you to ensure that the program enhances your conversations with clients, improves your product offering and helps you to grow your business.

To assist in providing you with the best possible support for promoting and educating your clients about AIA Vitality, we have prepared this brand guidelines document. Using this document will help to ensure consistency across all applications and a better experience for your clients.

In this document you'll find the rules that apply to the AIA Vitality brand, and how it should and should not be represented in the Australian market. Please familiarise yourself with these rules and ensure that you apply them whenever you are promoting AIA Vitality.

Please contact your Client Development Manager (CDM) or Client Development Associate (CDA) should you require further clarification on any of the information provided in this document.

# Using the AIA Vitality brand name and program information

When using the AIA Vitality brand name, or discussing the AIA Vitality program, please keep the following in mind:

- The 'AIA Vitality' brand name can only be used to promote AIA Vitality to Australian clients. Financial advisers are not to promote AIA Vitality to any market outside of Australia.
- When referring to the AIA Vitality program, you should always use the brand name in full, i.e. 'AIA Vitality'. Never refer to the program as just 'Vitality' or 'AIA Australia Vitality', or use any other variations.
- Any material, i.e. sales collateral, in which the AIA Vitality name appears, must be provided or approved by AIA Australia.
- Any AIA Vitality product information that is to appear in any promotional material not supplied by AIA Australia, i.e. created by you, your practice or any other third party, must be accurate and up to date.  
**All content must be submitted to your CDM or CDA for written approval before it is published or distributed.** Please allow at least five business days for approvals.
- When referring to the relationship between AIA Vitality and you or your practice, you should never refer to it as a partnership, rather that you are a 'program representative'.

- When discussing the benefits of the program, never speak in absolutes about anything that is dependent on other factors. For example:
  - 'AIA Vitality **makes you** healthier'. Instead, 'AIA Vitality **helps you to get** healthier by giving you the knowledge, tools and motivation to improve your health' is a more suitable alternative.
  - 'AIA Vitality **keeps you** motivated with fantastic savings and rewards'. Instead, 'AIA Vitality **can keep you** motivated with fantastic savings and rewards', is a more suitable alternative.
  - 'Receive a **35% Qantas** discount'. Instead, 'Receive **up to 35% discount on travel**', is a more suitable alternative.
  - 'Join AIA Vitality **to receive discounts on** your eligible life insurance premiums'. Instead, 'Your eligible life insurance premiums **can also be lower** when you join AIA Vitality', is a more suitable alternative.

Also, when making any claim, make sure you reference a sound source to back it up. For example:

- 'By eating well and exercising, you are less likely to claim on your life insurance'. Instead, 'Research conducted by Insurance Council Australia (2014) states that people who have healthier lifestyles were less likely to claim on their Income Protection insurance', is a more accurate narrative.
- 'Studies have also shown that the more you exercise, the more you actually want to, resulting in an easier and more enjoyable experience'. Instead, 'A study into the addiction of exercise (Lerche Davis, 2003) claims that the more you exercise, the more likely you are to enjoy it', is a more accurate narrative.

## **‘Vitality’ vs ‘AIA Vitality’**

The Vitality Group is a member of South Africa-based Discovery Limited, a leading international financial services organisation and the originator of the Vitality wellness program. As AIA Vitality is the sole provider of the Vitality program in the Australian market, financial advisers must be aware of phrases and facts that may conflict with, or not directly apply to AIA Vitality. For example:

- ‘AIA Vitality’ cannot claim to have over 5 million members worldwide; however ‘Vitality’ does have over 5 million members worldwide.
- ‘Vitality’ is the world’s leading scientifically backed health and wellness program, however ‘AIA Vitality’ cannot claim to be ‘world-leading’, but it is still a scientifically backed health and wellness program.

## **Public relations**

You may be contacted by the media for comment on the AIA Vitality program. If you are asked for your feedback and experience on the program you are free to provide your views and comment, however it must be made clear that these are your views and not the views of AIA Vitality or AIA Australia.

You may also issue your own press releases on your views on the program, however these must be provided to AIA Australia’s marketing department prior to their release. Previously stated facts and statistics about the AIA Vitality program that we have released may be used within your releases, quoting the appropriate source, provided that you have obtained confirmation from the AIA Australia marketing department that the facts and statistics are accurate and up-to-date and that you are using the information in the correct context, i.e. the information is not misleading by omission or otherwise.

All other questions about the AIA Vitality program including without limitation, questions regarding the specific performance of the program, associated brands, partners, key components of the program or future developments should be directed to the AIA Australia marketing department via your CDM or CDA.

## Guidelines for social media

When constructing content on AIA Vitality for social media platforms please keep the following guidelines in mind:

1. Any pages, profiles or groups in which AIA Vitality's name or product information appears, must be submitted to your CDM or CDA before it is published or distributed. You are allowed to share and retweet our official pages such as LinkedIn, Twitter and Facebook. This will help you grow your own profile too. AIA Vitality's official pages are available on our website: [www.aiavitality.com.au](http://www.aiavitality.com.au), at the bottom of the homepage.
2. You can only use the 'AIA Vitality Program Representative' logo on social media. Please see 'Using the AIA Vitality Logo' section in this document for more information.
3. Advertising your business or services on any official AIA Vitality page is not allowed. Any posts will be immediately reported and removed.
4. The duplication of AIA Vitality advertising images, Facebook cover page images and profile images on Twitter or LinkedIn is not allowed without prior written permission from the AIA Australia marketing department.
5. The name 'AIA Vitality' cannot be used in the title of your profile or page. When using the name 'AIA Vitality', it must appear in the body text.
6. The name 'AIA Vitality' must not be larger than the name or logo of your practice's name or logo.
7. You are not allowed to discuss or share personal or sensitive information about clients, or confidential or commercially sensitive information about AIA Australia or AIA Vitality. Participation in social media must always comply with all applicable laws, regulations, industry codes and guidelines.
8. Your profile page, bio and site should not create the impression that you are an employee of, or a spokesperson for, AIA Vitality. Do not respond to any comment on AIA Vitality in an official capacity. When publishing content relevant to AIA Australia or AIA Vitality (whether in your professional or personal capacity), please disclose your association with AIA Australia with the following disclaimer:  
*'The statements or opinions expressed [on this site OR in this post] are my own and do not necessarily represent those of AIA Australia or AIA Group.'*
9. Your conduct on social media channels established by AIA Australia or any of its related bodies corporate or joint venture partners is governed by the AIA Australia Social Media House Rules which can be accessed on AIA Australia's website at:  
<http://resources.aia.com.au/rs/aiaaustralia1/images/AIA-Australia-Social-Media-House-Rules.pdf> and other documentation as may be notified to you by AIA Australia from time to time.

# Using the AIA Vitality logo

It is not permissible for you or your practice to use the AIA Vitality logo in any promotional material not supplied by, or authorised in writing by, AIA Australia. Any material produced by you or your practice in which the AIA Vitality logo appears, must be the 'AIA Vitality Program Representative' logo as pictured below. When using the 'AIA Vitality Program Representative' logo, please seek permission from your dealer group first.

When using the 'AIA Vitality Program Representative' logo, the following options are available:

- The red positive, or reversed white version, should be used unless specified otherwise.
- The black positive logo should be used only when colour reproduction is not available.
- Always use the master artwork of the logo, do not recreate or modify the logo in any way.



The 'AIA Vitality Program Representative' logo should not be recreated or modified in any way. Here are some examples of what not to do.



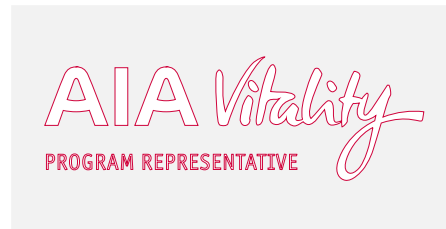
✘ Don't stretch the logo in any way



✘ Don't use other colours



✘ Don't apply any additional effects



✘ Don't outline the logo



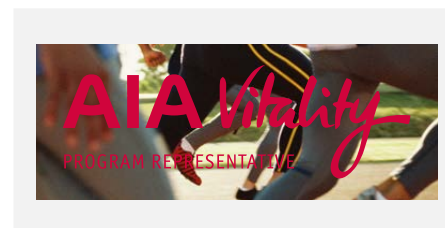
✘ Don't tint the logo



✘ Don't change the typeface



✘ Don't reverse the logo out of any other colours except red or black



✘ Don't place the logo on a cluttered background



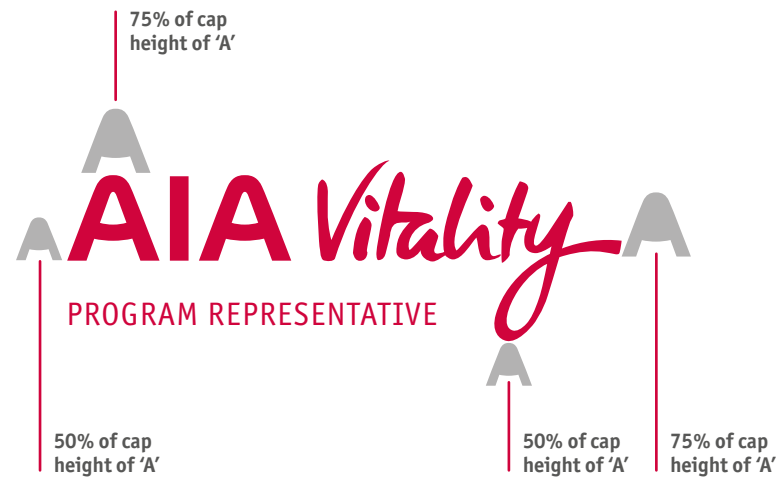
✘ Don't change the position of the Wordmark



## Clear space

Ensure that the 'AIA Vitality Program Representative' logo is always clear of other elements, such as text, photographs or other logos. The clear space left around the logo should be based on the cap height of 'A' from the 'AIA' within the logo. The percentages and their positioning are shown below.

The supplied brand mark files include clear space for ease of application. Your CDM or CDA can supply you with the logo on request.



## Minimum size

To ensure the 'AIA Vitality Program Representative' logo is easy to read when reproduced at small sizes, it should not appear smaller than 10mm in height in print applications. When used for screen, the logo should not appear smaller than 33 pixels wide.



## Co-branding with the financial adviser's practice

The 'AIA Vitality Program Representative' logo should never be placed next to your practice's logo. The practice logo should always appear dominant and appear at a diagonal or on the opposite corner from the 'AIA Vitality Program Representative' logo.



= 634 square mm

(at least twice the area of the 'AIA Vitality Program Representative' logo)



= 310 square mm

(no more than half the area of your practice's logo)

123ABC Financial

123ABC Financial ABN 00 000 000 000 is a Corporate Authorised Representative of XXXXX; AFS Licence 012345  
23 Crescent Road, Suburbia VIC 0000  
Phone: 00 1234 5678 Mobile: 0000 654 321  
representative@123abcfn.com www.123abcfn.com

AIA Vitality  
PROGRAM REPRESENTATIVE

Lorem Ipsum  
Dolor Sit Amet Nirbi Elementum

Dolor Sit Amet Nirbi Elementum Sinverunt. Dendit harum, int est quid maximet, ipis non con pero erunt exerum est anducipsae volorum que porempem ratem. Nequi bea cus utenet facimperibus delluptaqui quodi aut ut quiati.

✓ An example of the correct use of the 'AIA Vitality Program Representative' logo

AIA Vitality  
PROGRAM REPRESENTATIVE

123ABC Financial

123ABC Financial ABN 00 000 000 000 is a Corporate Authorised Representative of XXXXX; AFS Licence 012345  
23 Crescent Road, Suburbia VIC 0000  
Phone: 00 1234 5678  
Mobile: 0000 654 321  
representative@123abcfn.com  
www.123abcfn.com

Lorem Ipsum  
Dolor Sit Amet Nirbi Elementum

Dolor Sit Amet Nirbi Elementum Sinverunt. Dendit harum, int est quid maximet, ipis non con pero erunt exerum est anducipsae volorum que porempem ratem. Nequi bea cus utenet facimperibus delluptaqui quodi aut ut quiati.

✗ An example of the incorrect use of the 'AIA Vitality Program Representative' logo

# AIA Vitality colouring and imagery

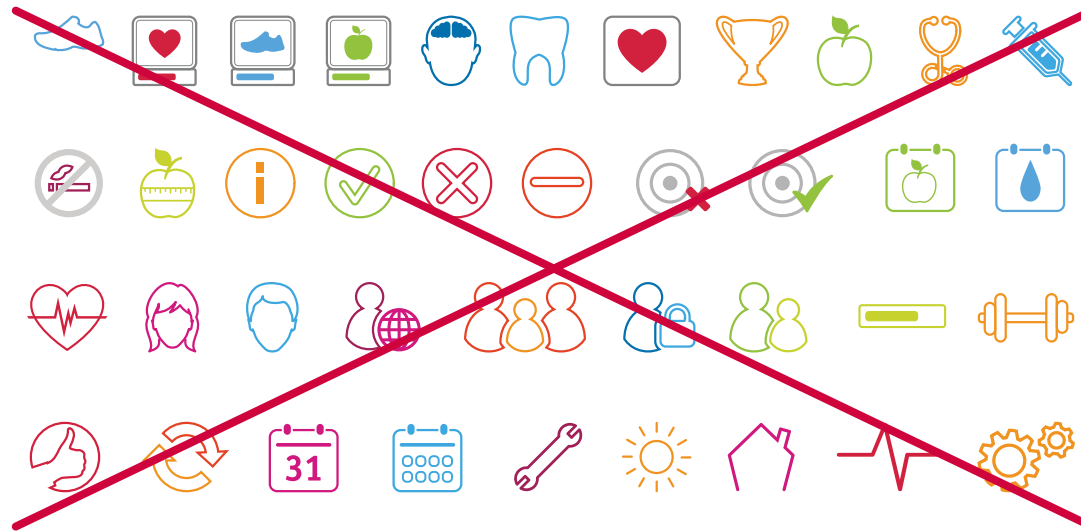
You or your practice should not try to recreate material to mimic the AIA Vitality brand in terms of colouring and imagery. It must be obvious to the viewer/receiver of materials that any unofficial AIA Vitality material has been created by the adviser/practice in question. You are encouraged to use existing materials accessible via your CDM or CDA.

Due to licence agreements, AIA Australia cannot supply you with any imagery, however we can suggest the type of imagery, such as the example provided below, that you could use if required. However, please ensure that you have the authority to use any imagery and that the imagery is used in accordance with all applicable laws.



## Icons

Financial advisers should not reproduce any AIA Vitality icons as pictured below. In addition, new icons should not be created to mimic AIA Vitality icons.





# Approval for marketing materials

All material containing the AIA Vitality name or relating in any way to AIA Australia, AIA Company Limited, Discovery Limited or the Vitality or AIA Vitality program (that has not been published by AIA Australia) needs to be sent to the AIA Australia marketing department for prior written approval via your CDM or CDA. Please allow up to five working days for a response.

AIA Australia reserves its rights to take any action or seek any remedy available to it at law for a material breach of any provision contained in these guidelines. You acknowledge and agree that you are solely responsible for ensuring all materials are accurate, up-to-date and not misleading by omission or otherwise and comply with all relevant laws and regulations. AIA Australia, to the maximum extent permitted by law, exclude all liability in relation to the materials and their content.

## Marketing checklist for submissions

Please refer to the checklist below prior to submitting materials to your CDM or CDA for approval:

- ✓ Have you used the 'AIA Vitality Program Representative' logo, not the 'AIA Vitality' logo on its own?
- ✓ Is a regular person likely to understand that AIA Vitality is distributed by AIA Australia? I.e. Is your practice's logo/content/style the most prominent on the page?
- ✓ Have you made it clear that the AIA Vitality program is not developed/owned by your practice/company? I.e. Have you clarified this in the copy and with use of your own practices branding as the dominant feature?
- ✓ Have you used approved content as provided by AIA Australia?

# Mediums

## Advertising

Financial advisers should not attempt to replicate or reproduce any AIA Vitality advertising for TV, radio, outdoor billboards, online or other without prior written consent from the AIA Australia marketing department.

If you are presented with a press advertising opportunity, i.e. newspaper or magazine, you can access a manipulable PDF file from your CDM or CDA on request. Should you require a different size, this can also be arranged through your CDM or CDA.

Should you wish to engage in any advertising opportunities on your own accord using the AIA Vitality brand, please provide details to your CDM or CDA for written approval before it is published or distributed.

Please allow at least five working days for a response.

**Finally, life insurance that pays you to be healthy.**

Join the program where your healthy choices are financially rewarded.

There's never been a better time to enjoy the perks of a healthy lifestyle. Vitality, the world's leading health and wellness program, rewards every effort you make to improve your health, big and small. By adding AIA Vitality to your life, you'll enjoy discounts on entertainment, shopping, travel and beauty, including up to 35% off at endota spas. Plus, you can even reduce your insurance premiums.

To join more than 5 million members worldwide who are already enjoying the benefits of this award-winning program, simply call 1800 333 613 or visit [aivitality.com.au](http://aivitality.com.au).

So what are you waiting for? Go, YOU!

**AIA Vitality**

AIA Vitality is available with eligible products issued by AIA Australia Limited (ABN 79 000 807 861, AFSL 230000). View the PDS and terms and conditions available at [aia.com.au](http://aia.com.au) and consider it's right for you.

**Finally, life insurance that pays you to be healthy.**

Join the program where your healthy choices are financially rewarded.

There's never been a better time to enjoy the perks of a healthy lifestyle. Vitality, the world's leading health and wellness program, rewards every effort you make to improve your health, big and small. With AIA Vitality, not only will you receive fantastic savings at our partners to help you improve your health, but you'll also enjoy discounts on travel and lifestyle products, including savings of up to 35% on popular fitness devices. What's more, your insurance premiums can also be lower.

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To join more than 5 million members worldwide who are already enjoying the benefits of this award-winning program, simply call 1800 333 613 or visit [aivitality.com.au](http://aivitality.com.au).

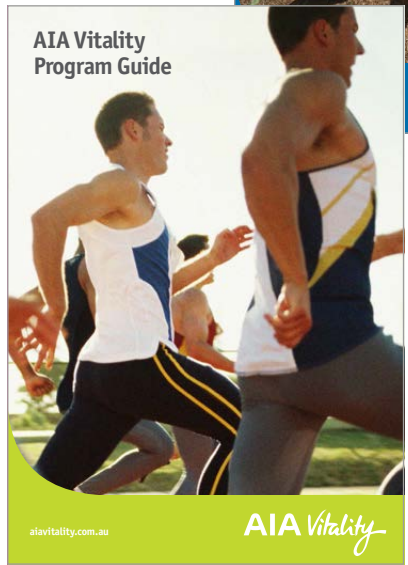
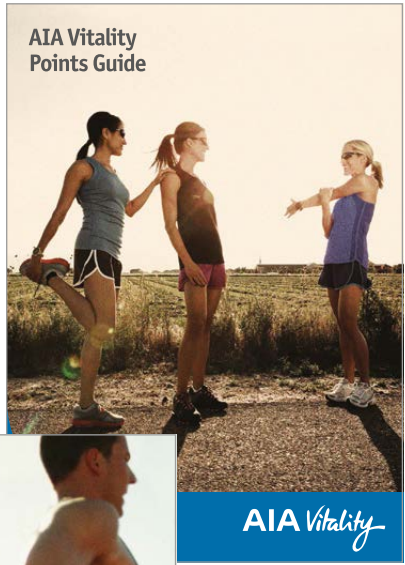
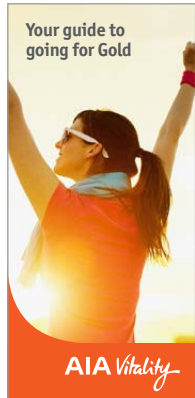
So what are you waiting for? Go, YOU!

**AIA Vitality**

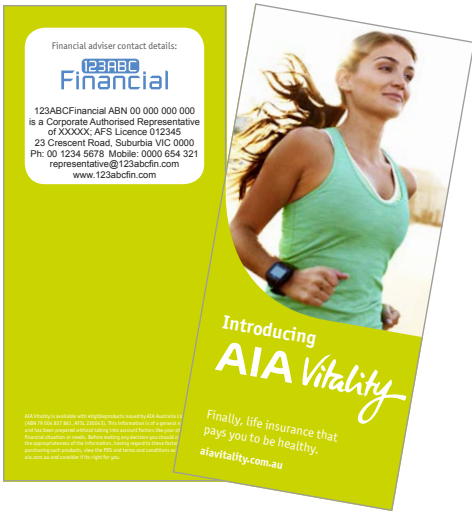
AIA Vitality is available with eligible products issued by AIA Australia Limited (ABN 79 000 807 861, AFSL 230000). View the PDS and terms and conditions available at [aia.com.au](http://aia.com.au) and consider it's right for you.

## Printed collateral

You have several flyer, brochure and poster options available for you to use, including the option to co-brand material. Please speak with your CDM or CDA for available options.



AIA Vitality branded (exclusive)



AIA Vitality branded (co-branded)

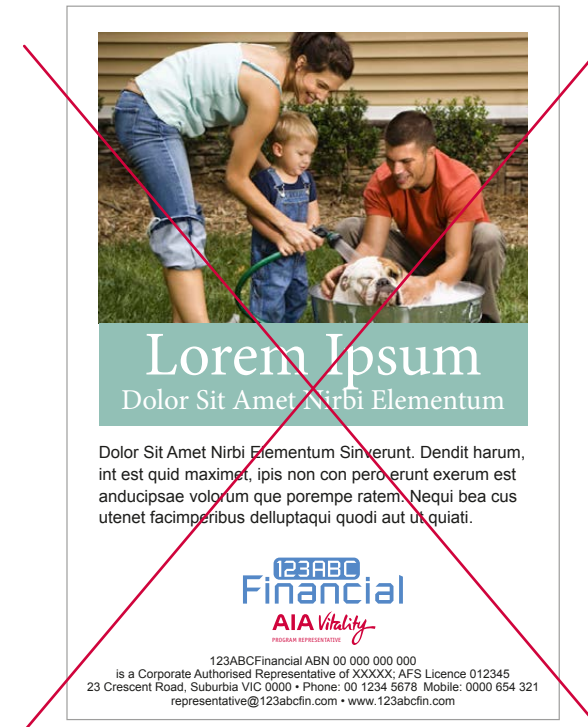


When including AIA Vitality product information on your own collateral, i.e. collateral that is created by you, your practice or any other third party, please ensure that it is accurate and up-to-date and not misleading by omission or otherwise. Updated AIA Vitality product information and materials can be accessed via your CDM or CDA on request.

In addition, the 'AIA Vitality Program Representative' logo should never be placed next to the practice logo. The practice logo should always appear dominant and appear at a diagonal or the opposite corner from the AIA Vitality logo.



✓ An example of the correct use of the 'AIA Vitality Program Representative' logo



✗ An example of the incorrect use of the 'AIA Vitality Program Representative' logo



## Business cards

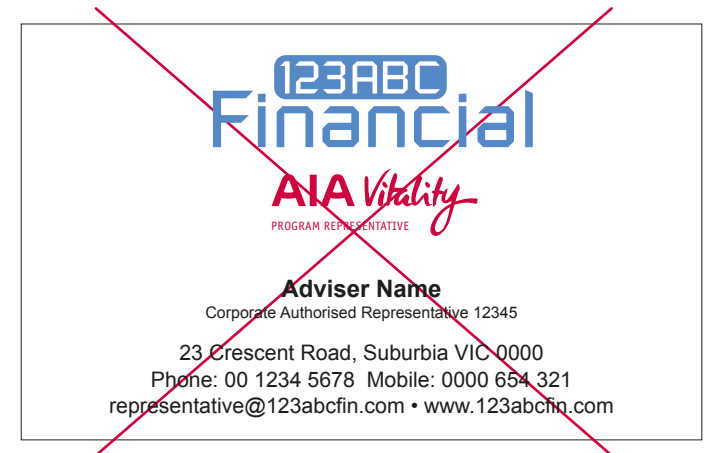
When designing your business cards, you can choose to include the 'AIA Vitality Program Representative' logo.

The logo should never be placed next to the practice logo. The practice logo should always appear dominant and appear at a diagonal or opposite corner from the AIA Vitality logo.

Your practice logo must be at least twice the area of the 'AIA Vitality Program Representative' logo.



✓ An example of the correct use of the 'AIA Vitality Program Representative' logo on a business card.



✗ An example of the incorrect use of the 'AIA Vitality Program Representative' logo

## Direct mail and EDM campaigns

When running direct campaigns either by email, mail or through call centres, you should never give the impression that you are an employee or spokesperson of AIA Vitality. Always ensure it is absolutely clear that you are calling from your own practice and that you are a program representative of AIA Vitality.



✓ An example of the correct use of the 'AIA Vitality Program Representative' logo



✗ An example of the incorrect use of the 'AIA Vitality Program Representative' logo

## Branded vehicles

When branding your vehicle, please ensure that the 'AIA Vitality Program Representative' logo is never larger than the name or logo of your practice.

Please contact your CDM or CDA to access artwork for this.



✓ Acceptable



✗ Not acceptable

## Domains and websites

AIA Vitality will provide you or your practice with website content and materials such as copy, MRECs, leaderboard banners, video content available from your CDM or CDA on request.

It is advised that any AIA Vitality related information sits within your own practice's website rather than establishing a separate domain or microsite. In addition, 'AIA Vitality' or 'Vitality' must not be used in any domain names. Extended URLs are acceptable when represented as per the breadcrumb example here, i.e. [www.123abcfinancial.com/AIA-Vitality](http://www.123abcfinancial.com/AIA-Vitality)

When creating either a landing page or a section for AIA Vitality within your practice's website, you should use the suggested elements listed here.

## Suggested elements for AIA Vitality page/section within an existing website

- AIA Vitality introduction
- AIA Vitality summary
- Image of the AIA Vitality Wheel
- AIA Vitality Program Representative logo
- Banners or MRECs
- A live link to URL [aiavitality.com.au](http://aiavitality.com.au)
- Social media platform icons with live links to
  - LinkedIn, Twitter, Facebook

You must submit the website page to AIA Australia's marketing department via your CDM or CDA for written approval prior to the information going live on your website. Before you submit this for approval, please complete the checklist located under the 'Approval for Marketing Materials' section of this document.



## Powerpoint presentations

When presenting AIA Vitality to clients, please use either your company's template or include your company's logo to the presentation available from your CDM or CDA on request.

**Your company logo**

123ABC  
Financial

Click to edit Master title style

Click to edit Master subtitle style

Section 1

123ABC  
Financial

AIA Vitality  
PROVIDE REPRESENTATION

**Your company logo**

Title of Slide - bullets

- Body copy
- Body copy
- Body copy
- Body copy
- Body copy

3

Title of Slide (no bullets)

**Sub Heading**

Body copy oluptatus ab illigent acepudaera cum laut andereiur, aut experspel et minullic tem doluptaque consequi aspedis sit di cus alit laboritios nissinis erferepudae voluptat volupis res et ommodipsa vella et iminveris explam, nis dolonia num voluptatur, niatemo loreper ruptat.

Dolorestrum qui as ut quatem repudi dolum nobitassitas aut magnis eturi que nem vel in net eum di dolluta sapiet quae cullabo rentur alit, volecum quatium quiatquis sunt aut velitem. Ut dusapero vendam, sita simpere, consequae plitatur aut pe nate peritae nos dellabor sequi.

2

## Merchandise

We have a range of branded merchandise options available for order via your CDM or CDA on request. Financial advisers are allowed a set number of complimentary merchandise. Should you require additional stock, a price list is also available.



# About AIA Vitality benefits and rewards

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AIA Vitality has various contractual agreements with several organisations. These agreements dictate how we represent their brands and the manner in which rewards are portrayed in promotional materials. With this in mind, it is important to:

- Never call out the discount amount when talking about a particular brand. E.g. 'Receive 35% discount from Qantas', is not allowed. Instead, 'receive up to 35% off travel' is appropriate.
- Never use any brand logos in relation to AIA Vitality.

When referring to their brands, please use the structure outlined below. NB: These may change from time to time so ensure you check with your CDM or CDA for any updates.

- 7.5% initial discount on eligible AIA Australia lump sum insurance premiums
- Up to 30% off fresh fruit and vegetables and healthy eating programs
- Up to 35% off travel, lifestyle, shopping and entertainment
- Up to 35% off fitness devices
- Up to 40% off gym memberships
- Up to 70% off cinema tickets

Any communication about third party/reward brands must always be approved in writing by the AIA Australia marketing department. Please contact your CDM or CDA in advance of the communication being distributed.

# Questions and enquiries

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Please contact your CDM or CDA via the contact details below if you have any questions about AIA Vitality's brand guidelines for financial advisers.

Phone: 1800 033 490

Email: [au.adviserservices@aia.com](mailto:au.adviserservices@aia.com)

**Thank you for your continued support of the AIA Vitality program. We look forward to sharing a long lasting relationship with you.**



# AIA Vitality

[aiavitality.com.au](http://aiavitality.com.au)