



# INTER-OFFICE MEMO

JANUARY 09, 2025 | 3:00 PM

**To:** All AIBI Employees  
**Subject:** 2025 FIRST MEETING

Dear Team,

- **Collection Signed-Off Reports**

- Review of signed-off reports based on Invoice and Proforma.
  - As discussed during the follow up meeting (01/14/ 2025) HES and MAM will use the template of HES as their signed off file. Uncollected from 2022 below will not be part of the report but will be put on note.

- **Premium Invoice Adjustment**

- Further deliberation re switching to Proforma Invoice format after current booklet stock is depleted.
  - MNLA will inquire with AMC if it's possible to shift to Proforma Invoice once the current booklet is depleted.

- **HMO Client Concerns**

- Agreed to set a meeting with Etiqa to address issues related to HMO, particularly pending medical claims &/or reimbursements.
- Meeting with Cocolife on the possibility of doing more business in CY 2025.

- **2025 Prodcution & Budget Projection**

- Review of the 2025 budget, highlighting projections for Revenues & Expenses. The CY 2025 budget still has to be approved after final review of income/[projections.

## 5. Proforma Template

- Confirmation by FBSJ that the date of coverage is already incorporated in the template. Proposed to add remarks: New, Add/Endt or Renewal.

## 6. Invoicing

- For GPA, Travel PA, and PA, the premium tax will be entered in the "Others" field because the SOA generation process does not recognize the Premium Tax field.

  
APRILANE F. ASTROLOGO