

# JIMMY'S VISION CLUB

A Special, Awards & Recognition Partner Initiative



**Jimmy Patel - MD & CEO**

Quantum Asset Management Co. Pvt. Ltd.

## About the Initiative

Quantum Mutual Fund launched Jimmy's Vision - a Special, Partner to CEO connect platform earlier this year, to help Financial Partners / Distributors / Advisors to cater to their concerns on the Mutual Fund industry. It is our continuous endeavor to provide knowledge based value added services to Financial Partners.

Building on this initiative the Fund house has phased into and launched a Club membership called Jimmy's Vision Club for Partners associated with the Fund.

A knowledge based membership club for registered Partners, the club categorizes Partners into 4 membership levels. Each level will provide certain educative benefits to help scale the MF business of registered Partners.

Quantum Partners will be categorized basis the below mentioned point system into 4 levels - Platinum, Gold, Silver and Bronze.



Sr. No.	Criteria	Details	Reward Points		
1	CFG Completion		500		
2	CFG Referral	CFG Registration by Referee	100		
		CFG Completion by Referee	250		
			Equity	Debt & Gold	Liquid
3	Gross Sale	Per Rs 500	1	1	0.75
4	New Account	Per Folio	10	10	10
5	SIP	Per Rs 500	2	1.5	1.25
6	STP	Per Rs 500	1.25	0.75	0.5

# Benefits attached to the 4 levels of membership




PLATINUM	GOLD	SILVER	BRONZE
<ol style="list-style-type: none"> <li>1. Certificate of merit</li> <li>2. Awards &amp; Recognition</li> <li>3. Upcoming QMulti Transact - Platform to Transact across all Mutual Funds</li> <li>4. Research reports, online guides, e-books</li> <li>5. Sponsored training programs</li> <li>6. CFG features (ALL + Portfolio Reviewer + Asset Allocator)</li> <li>7. Quantum Zonal Representative (Selective Basis Industry AUM)</li> <li>8. Personal interaction with senior management – <ul style="list-style-type: none"> <li>» CEO</li> <li>» Fund Managers &amp; Senior Sales Personnel</li> <li>» Risk &amp; Regulatory</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>1. Certificate of merit</li> <li>2. Awards &amp; Recognition</li> <li>3. Upcoming QMulti Transact - Platform to Transact across all Mutual Funds</li> <li>4. Focused group meetings with the CEO &amp; Fund Managers</li> <li>5. Personal interaction with Senior Sales Personnel</li> <li>6. Research reports, online guides, e-books</li> <li>7. CFG Features (ALL + Portfolio Reviewer + Asset Allocator)</li> <li>8. Quantum Area Representative (Selective Basis Industry AUM)</li> </ol>	<ol style="list-style-type: none"> <li>1. Certificate of merit</li> <li>2. Awards &amp; Recognition</li> <li>3. Upcoming QMulti Transact - Platform to Transact across all Mutual Funds</li> <li>4. Group meetings with senior sales personnel</li> <li>5. Training from senior sales personnel for Business Development/ Enhancement</li> <li>6. CFG Research Reports &amp; Asset Allocator (ALL excluding Portfolio Reviewer)</li> </ol>	<ol style="list-style-type: none"> <li>1. Certificate of merit</li> <li>2. Awards &amp; Recognition</li> <li>3. Upcoming QMulti Transact - Platform to Transact across all Mutual Funds</li> <li>4. Group meetings with the senior sales personnel</li> <li>5. CFG Research Reports (ALL excluding Portfolio Reviewer &amp; Asset Allocator)</li> </ol>

# Terms & Conditions

- This program is applicable to all registered IFAs and other Partners (Non NDs & banks, with all industry AUM of 50 crores or less) with Quantum AMC
- The program is a point based qualifier for categories
  - ➔ Platinum Category - 10,000 points
  - ➔ Gold Category - 7,500 points
  - ➔ Silver Category - 5,000 points
  - ➔ Bronze Category - 2,500 points
- There are three parameters valid based on which points are allotted (please refer to the points table in the Presentation/one pager)
  - ➔ CFG Referral and certification (refer to points table)
  - ➔ New Folios (All non ETF Schemes) unique PAN
  - ➔ Gross Sales (All non ETF Schemes)
- CFG Referral
  - ➔ For Calculation of points the first 6 referrals only will be considered
  - ➔ Referrer has to be CFG certified to refer
  - ➔ Referee has to complete CFG registration only then referral points will be allocated to referrer
  - ➔ Bonus points will be awarded to the referrer only when the referee completes the CFG certification
- The period of the Gross Sales, SIPs and New Folios will be from 1st April 2017 till 31st March 2020, and subsequent financial year
- PAN of primary holder folios will be considered for calculation of points of new folios
- Partner's self-investments in any of the Quantum Schemes will be considered for calculating the points, however no brokerage will be paid
- Partners family member's investments will be considered on the basis of PAN
- In-case of Regular plan-Switches from Debt, Gold to equity will be considered for calculating points but equity to equity will not be considered as gross sales, also switches from equity to debt will be considered. Switches within the same asset class will not be considered for calculating points
- The AMC will review the points status and business done on a quarterly basis and the necessary adjustments within categories will be done as per the quarter end status
- Quarterly AAUM has to be minimum 2 lakh, 7 Lakh, 12 Lakh and 17 Lakh for Bronze, Silver, Gold and Platinum respectively at the time of quarterly review. If the average AUM is less than the required minimum amount then the points would be reduced to the extent of shortage of AAUM
- Transfer of assets from different ARNs will not be considered for calculation of points
- Eligible Investors as per the Offer Document
- Award & Recognition program
  - ➔ Top 3 CFG Referrals
  - ➔ Top 3 Gross Sales Mobilisers across categories
  - ➔ Top 3 SIP mobilisers across categories
  - ➔ Top 3 New Folio (Unique PAN) mobilisers across categories
- The AMC reserves the rights to revise the points, categorization and T&C
- Other terms and conditions apply

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Mutual fund investments are subject to market risks, read all scheme related documents carefully.