Proposition
for
joining I-CAN as
a Business Associate

Create value for your clients,

&

Multiply your revenue

I-CAN FINANCIAL SOLUTIONS

Contents

- What is I-Can
- How can we work together
- Support to be provided

Introducing
I-CAN Financial Solutions

I-CAN FINANCIAL SOLUTIONS

About I-CAN

- Launched in February 2012
- The cumulative experience of the people associated with I-CAN is over **75 years**
- I CAN is being mentored by **Sanjay Sinha**,

  ex-CEO of L&T Mutual Fund

- With our experience, we understand **Customer Requirements** better & how to **develop Business Opportunities**

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About I-CAN

- Team I CAN has exclusive access to the proprietary research model of **Citrus Advisors**
- We provide Access to **Multiple products**, **Advanced Technological Platform** and **Expert Mutual Fund Research**
- **Online portal** to manage and track Client Portfolios
- **We believe in Quality** in every activity – Design of website, Flow of our platform & Depth of our Research

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Vast access to various Solutions through I CAN

- **Investment Solution:**
  - 2100 Plans of 700+Funds from 37 AMCs
  - Portfolio Management Service (PMS) for direct equity exposure
  - Alternative Investment Funds (AIF) for special asset classes such as private equity, real estate etc.
- **Insurance Solution:**
  - All Life Insurance products
  - All General Insurance products
- **Loan Solutions:**
  - Housing and personal loans from 6 loan providers

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Working as a Business Associate

- Join as a Business Associate
- I CAN will provide:
  - Access to multiple products
  - Guidance in client servicing
  - Product selection
- I CAN will also provide complete back-office support to the Business Associate so that they can rigorously focus on building their business.

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Working as a Business Associate – Step 1

- Register your client online or offline on the I CAN platform
- Every client transacting from our online solutions module will be **mapped to a Unique Business Associate**
- Two Ways of getting credit for the client

  1. Business Associate can register a client from his own login
  2. A link will be provided to the business associate, that can be distributed among potential clients. Once a client registers clicking on the link, client will be automatically mapped to the business associate

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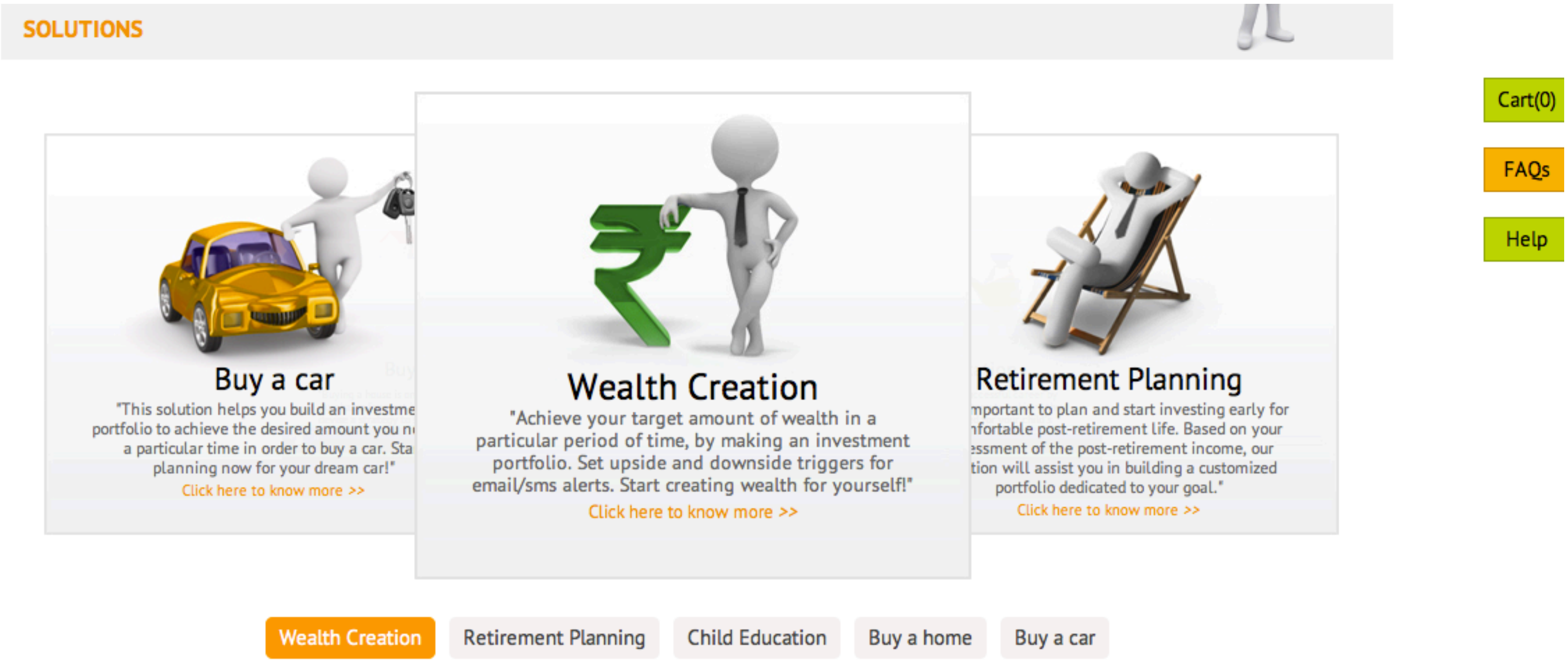
Creating Your Customized Goals



TO WATCH **DEMO VIDEOS** OF OUR PLATFORM

visit our website – www.icanindia.com

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Step 2
Creation of Goal for client (1/2)

- **Method 1**
  - Business Associate creates a goal & solution for the client in associate's own account
  - On saving the solution, it becomes visible in the client's account
  - Client can modify and confirm the solution for generating pre-filled application forms
  - Business Associate gets credit for the client's transaction
- **Method 2**
  - Business Associate creates a goal & solution for the client in associate's own account
  - Takes a print of the solution details & carries to client for approval
  - On client's approval, the business associate confirms the solution in his account and generates the pre-filled application forms
  - Business Associate gets credit for the client's transaction

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Step 2
Creation of Goal for client (2/2)

- **<u>Method 3</u>**
  - Client creates a goal & solution himself
  - Client prints and submits his application himself
  - Business Associate gets credit for the client's transaction

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Support to be provided

- State of the art technological platform
  - Providing Plug-n-Play access to over 2000 financial products at a single location
- In house Expert Research team
  - Backing the right product selection
- In house Training Infrastructure for intermediaries
  - Certification
  - Refresher
  - Skill upgradation
- Brand building in your territory
- Marketing support
- Back office support
  - Through online platform
  - Through Centralized office
- Customer Support

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Future Road Map

- With India story going strength to strength there is enough room for all professionals to co exist if 3 C's are followed.
  - **Collaborate, Coordinate, Co-exist**

- Clients are looking at genuine value addition and quality advise. Inappropriate advise can be very costly for a professional.

- It is a WIN –WIN- WIN for all concerned.

  (Clients, Professionals, Product Providers)

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Come, Join us!

- Join us & provide your clients with expert financial advice

- Visit our website: www.icanindia.com

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Thank You

The End