

Introducing the Online Solutions Module Platform from I-CAN Solutions

Revolutionary Mutual Fund platform
with goal-based solutions



About I-CAN

- 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
- Team I CAN has exclusive access to the proprietary research model of Citrus Advisors

Phase I : B2B Platform Launch

- Launched in March 2013
- Providing Expert Mutual Fund Research & Access to Multiple Products – Mutual Funds, Life and General Insurance, Fixed Deposits, Loan Solutions
- Online portal to manage and track Client Portfolios

Phase II : Online Solutions Module

- Launching in October 2013
- As a B2C platform in the Top 8 cities (Metros and Mini metros) and as a B2B Platform in all other cities.
- Providing innovative first of its kind Goal-based Solutions for the clients
- Option to clients to invest in 800 funds of his choice or in the shortlisted funds with I CAN's recommendations



How does it work?

- Every client transacting from our online solutions module will be **mapped to a Unique IFA**
- Two step process
 - Registration of client with I-Can
 - Creation of Goal for the client




How will a client be mapped to an IFA?

- Two Ways of doing this:
 1. IFA can register a client from his own login, print his registration form and send it to I-Can with Client's signature
 2. A link will be provided to the IFA, that can be emailed by IFA to potential clients. Once a client registers clicking on the link, client will be automatically mapped to the IFA

Creating Your Customized Goals


SOLUTIONS



Buy a car

"This solution helps you build an investment portfolio to achieve the desired amount you need at a particular time in order to buy a car. Start planning now for your dream car!"

[Click here to know more >>](#)



Wealth Creation

"Achieve your target amount of wealth in a particular period of time, by making an investment portfolio. Set upside and downside triggers for email/sms alerts. Start creating wealth for yourself!"

[Click here to know more >>](#)



Retirement Planning

"It is important to plan and start investing early for a comfortable post-retirement life. Based on your assessment of the post-retirement income, our solution will assist you in building a customized portfolio dedicated to your goal."

[Click here to know more >>](#)

Wealth Creation

Retirement Planning

Child Education

Buy a home

Buy a car

Cart(0)

FAQs

Help

Creation of Goal for client ...

- **Method 1**

- IFA creates a goal & solution for the client in IFA's 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
- IFA gets credit for the client's transaction

- **Method 2**

- IFA creates a goal & solution for the client in IFA's account
- Takes a print of the solution details & carries to client for approval
- On client's approval, the IFA confirms the solution in his account and generates the pre-filled application forms
- IFA gets credit for the client's transaction



Creation of Goal for client

- **Method 3**
 - Client creates a goal & solution himself
 - Client prints and submits his application himself
 - IFA gets credit for the client's transaction



Know more

- **Visit www.icanindia.com**
 - Open the “Investment Solutions” page by clicking on it twice
 - Click to open the “Investment Solutions Demo” video on the left hand side
 - There are 5 videos of appx 1.5 – 2 mins each
- **Contact us**
 - For further details
- **Online presentations:**
 - Go to home page of www.icanindia.com
 - Go to the bottom of the page
 - Click on the “Download” button
 - Download the presentations on “ Why should an IFA join I-Can” and “Mentorship Grid”

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Thank You

The End