Edutainment Program for Key Business Partners, District Ambassadors & District Representatives

LIC MUTUAL FUND

Period:
1st August to 30th November, 2018

Edutainment Program Structure:

Target			Rewards
Net Sales (Inflow - Outflow)	**OR**	**SIP/STP**	**Location***
₹ 1,30,00,000/-	OR	300	Bulgaria / Ukraine
₹ 95,00,000/-	OR	220	Vietnam / Malaysia / Philippines
₹ 55,00,000/-	OR	125	Hyderabad / Tamil Nadu / Gujarat / Rajasthan

* International Trip will be for 3N & 4D and Domestic Trip will be for 2N & 3D.

Schemes & Weightage -

Eligible Schemes	Weightage
All LIC MF Equity Schemes Except LIC MF Index Funds, ETF, ELSS & LIC MF Children's Gift Fund	100%
LIC MF Children's Gift Fund	125%
LIC MF Tax Plan / ULIS collection is < 25% of total mobilization	100%
LIC MF Tax Plan / ULIS collection is => 25% & < 50% of total mobilization	110%
LIC MF Tax Plan / ULIS collection is => 50% of total mobilization	125%
PMS (Value Equity Fund)	150%

Eligibility Criteria

For Net Sales (Inflow - Outflow) Amount:

10% mobilization in ELSS Scheme (LIC MF Tax Plan) or 10% in LIC MF ULIS, balance 90% in other Equity & Debt Schemes (LIC MF Equity Hybrid Fund, LIC MF Multi Cap Fund , LIC MF Large Cap Fund, LIC MF Infrastructure Fund, LIC MF Large & Mid Cap Fund, LIC MF Banking and Financial Services Fund, LIC MF Debt Hybrid Fund and LIC MF Children's Gift Fund).

For SIP/STP:

10% mobilization in LIC MF Tax Plan or 10% in LIC MF ULIS, balance in other Equity Schemes (LIC MF Equity Hybrid Fund, LIC MF Multi Cap Fund, LIC MF Large Cap Fund, LIC MF Infrastructure Fund, LIC MF Large & Mid Cap Fund, LIC MF Banking and Financial Services Fund and LIC MF Children's Gift Fund).

* For SIP/STP: Minimum ticket size ₹ 2,000 & minimum tenure 36 months. The count will be taken in multiples of ₹ 2,000 maximum to ₹ 15,000.
e.g.
1) SIP/STP of ₹ 15,000 (minimum tenure 36 months), SIP/STP count will be taken as 7.
2) For above ₹ 15,000 ticket size, the excess amount will be considered under lump sum. For e.g. if SIP/STP for ₹1,00,000 up to ₹ 15,000 the count of 7 will be under SIP/STP and balance ₹ 85,000 will be considered under lumpsum.

Illustration:

To arrive at lumpsum credit from SIP/STP, one SIP/STP of ₹ 2,000/- equals to ₹ 72,000/- (2000*36) and there after in multiples of ₹ 1,000/- equals to ₹ 36,000/- (1000*36).
e.g.
1) 1 SIP/STP of ₹ 3,000/- to arrive at lumpsum ₹ 2,000/- equals to ₹ 72,000/- (2000*36) and ₹ 1,000/- equals to ₹ 36,000/- (1000*36).
2) For above ₹ 15,000/- ticket size, the amount will be considered under lump sum.

For STPs, source scheme should be LIC MF Liquid Fund, LIC MF Saving Fund and LIC MF Banking & PSU Debt Fund.
STP in multiple schemes with same PAN will be treated as one STP.
e.g. Same PAN given STP of ₹ 5,000, ₹ 15,000 and ₹ 2,000 in 3 different equity schemes, for contest we will take maximum contribution and credit will be given accordingly. In above e.g. we will take ₹15,000 STP and credit of 7 will be given.

For Children's Gift Fund lump sum collection :

1.25 times weightage will be given, e.g if collection of 50 lacs brought in LIC MF Children's Gift Fund weightage will be given for ₹ 62,50,000 (50 lacs*1.25). This is only for lumpsum business.

For Tax Plan / ULIS lump sum collection :

1. If collection is => 25% & <50% - 1.1 times weightage will be given
2. If collection is => 50% - 1.25 times weightage will be given

e.g. Target of ₹1 crore, if IFA is doing 75% Tax Plan (₹ 75 lacs) then 1.25 times weightage will be given i.e. ₹ 93,75,000 (75*1.25), balance ₹ 6,25,000 can be done in other eligible schemes. So total he/she will be giving only ₹ 81,25,000 against 1 crore target.

For PMS collection :

1.50 times weightage to be given i.e for. ₹ 25,00,000/- collection under PMS (value equity fund) credit of ₹ 37,50,000/- to be given (25lacs*1.5).

Terms and Conditions:

- Total net sales (Inflow - Outflow) mobilization (fresh purchases & additional purchases) and switch from LIC MF Liquid Fund, LIC MF Savings Fund & LIC MF Banking & PSU Debt Fund will be considered.
- Edutainment amount sponsored will be proportionately / completely recovered / clawed back / set off from the future payments if the investor has redeemed / switched his / her investment before completion of 18 months from the date of allotment of units for Net Sales Amount (Inflow - Outflow).
- For SIP, edutainment amount sponsored will be proportionately / completely recovered / clawed back / set off from the future payments if the investor has redeemed / switched his / her investment before completion of 36 months from the date of allotment of units.
- Applicable for KBP / DA / DR of Upfront + Trail Model and Full Trail Model.
- There will be no change in incentive / additional incentive payable for the investments during the Edutainment eligibility period.
- Last day login subject to fund realization within 3 working days will be considered.
- Splitting of ticket will be done provided 10% of ELSS (LIC MF TAX PLAN) or 10% of LIC MF ULIS is done on total mobilization.
- SIP/STP advance upfronting cases will not be entertained.
- 10% Tax Plan or ULIS is applicable to all type of business i.e. Lumpsum or SIP/STP.
- Full fungibility between lumpsum and SIP/STP.
- Destination may change as per the availability.
- Passport should be valid for 6 months from the date of departure. Each qualified contestant should provide proper documents required for visa procedures. The name in the qualifying list should be as per passport for international travel. Documents required for visa for any specific country will be emailed separately from event management team.
- The program is not transferable.
- LIC MF management decision will be final & binding, management reserves the right to modify/delete the Edutainment program & it's terms & conditions without or prior intimation.
- Any disputes arising out of this contest will be subject to Mumbai Jurisdiction only.

3 Daily Good Habits

Drinking eight glasses of water

Exercising

Reading the newspaper

Cultivate another.

Invest through **DAILY SIP**

(Systematic Investment Plan)

To know more, please consult your **Financial Advisor**

OR

Call Toll Free

1800-258-5678

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MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.