



 **Edelweiss** | PARTNERS
Ideas create, values protect

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Loyalty & Club

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Loyalty Club

Gift Options –
Redeem points & avail Gift Hampers of leading brands -

Shopping Vouchers

Gadgets & Accessories

Travels





Loyalty Club

How Partners will earn points?

Loyalty Rewards Points		(T&C Apply)
	Business Volume (Amt in Crs)	Points
Edelweiss NCD	1 Cr	5,000
Structured Products	1 Cr	5,000
HL & Mortgages Disbursement	1 Cr	4,000
NCD Issuances	1 Cr	1,000
MF Lumpsum Mobilized	1 Cr	1,000
Corporate FDs	1 Cr	500
54 EC Bonds/RBI Bonds	1 Cr	400
Equity IPOs	100 App	50
MF SIPs	1 SIP of 1000 BV	10



Example 1	
Advisor X	Points
500 SIPs	5,000
4 Crs Edelweiss NCD	20,000
100 Equity IPO Apps	50
TOTAL	25,050

Example 2	
Advisor Y	Points
1 Cr Structured Product	5,000
2 Cr MF Lumpsum	2,000
1 Cr Disbursement	4,000
TOTAL	11,000



Terms & Conditions:

- The terms and conditions of this Loyalty Club is applicable to all Partners empanelled/ to be empanelled with Edelweiss Partners.
- Unless revoked or terminated, Loyalty Club shall be valid for the financial year 2019-20, i.e. from April 01, 2019 to March 31, 2020 or such other period as may be announced by Edelweiss Partners ('Tenure'). The business procured in first Quarter 1st April, 2019 to 30th June, 2019 will be considered in the contest and accordingly displayed in the points section.
- Only valid and executed/ settled deals, allotment(s) taking place during the Tenure in accordance with internal policies of Edelweiss Partners and applicable laws for the time being in force will be considered for the Loyalty Club.
- The trades executed by partners with its group companies or their Directors, Key managerial Personnel or employees and representatives shall not be considered.
- All partners can redeem reward points only after achieving minimum 500 reward points earned through mobilization only.
- Partners will be able to redeem the points only during the redemption window period. The redemption window will be open minimum of three times during the Tenure. The first redemption will be on October 2019, second on January, 2020 and April 2020. All leisure trips can be claimed only at the end of the financial year.
- In case Edelweiss Partners decides to extend the Tenure of Loyalty Club, the unutilized reward points of Loyalty Club may be carried forward by partners subject to maximum of 50% unutilized points and subject to the condition partner has earned at least 500 reward points.
- The gift claimed in the valid manner shall be distributed within one month from the last date of related redemption window. The partner has an option to redeem reward points during the given window period or to carry forward at next redemption window.
- Once the gifts are delivered to partners in proper condition to the satisfaction of the recipient, Edelweiss Partners will not be responsible for any dispute regarding the post-sale service etc. The articles on display are indicative and the exact delivery is subject to availability of the articles. The specifications of each article must be checked before redeeming points against them.
- Partners should not offer or induce clients with any incentives, rebate, gifts or commissions in return of their investments.
- Partners should bear in mind the interest of their clients and investors as well as suitability to their financial needs. If it is found/ brought to our notice that the partner is, mobilizing the funds solely for the purpose of winning the prizes, the amount mobilized shall not be considered under Loyalty Club. The partner shall ensure their participation in Loyalty Club in fair, transparent and equitable manner. If any miss-sell is brought to our notice by investors or if we find out, such transactions will not be considered for the loyalty club.
- Under no circumstances, the prizes, if any will be exchanged for cash.
- Edelweiss Partners reserves the right to make any amendments/modifications/ deletion including withdrawal of scheme with no liability at any point of time without prior notice and with no obligation of assigning any reasons for the same and partners agrees, declares that he shall not challenge the decision of Edelweiss Partners in this regard in any manner whatsoever.
- Options provided for prizes shall depend upon the availability of the brands / items. If there is non-availability of any particular Brands /items, then Edelweiss Partners will provide any other gift at its own discretion or will reverse the reward points to partner's account
- While redeeming the reward points for Gift Cards including e-vouchers, trips or other prizes, the terms and conditions of the respective service provider/ vendor would apply to the partner. The e-voucher, if any, shall be communicated to partner via registered email id. Hence, partner need to ensure the accurate email id registered with Edelweiss Partners. Edelweiss Partners shall not be responsible for any unauthorized use of e voucher by unknown recipient.
- Edelweiss Partners will not be liable for any deficiency/defect in any product or delay, if any, in provision of service by the concerned dealer/service provider subsequent to delivery of such prizes.
- All taxes and other applicable levies in respect of the prize will be borne by the relevant partner winning such prize on fulfillment of all the terms and conditions of Loyalty Club. Announcement of award and its subsequent delivery may be subject to recovery of tax or levies imposed/likely to be imposed on Edelweiss Partners from the concerned partner.



- All partner participating in Loyalty Club shall be deemed to have agreed to all the terms and conditions of Loyalty Club issued from time to time and no further consent will be required to be obtained from any Edelweiss Partners under any circumstances.
- This document is private and is intended for partner registered with Edelweiss Partners. Neither this document nor any portion hereof shall be sold, reproduced or redistributed in any form, directly or indirectly, to any person/ entity, in whole or in part, for any purpose whatsoever, other than BA who is registered with Edelweiss Partners.
- Allotment amount will be considered for calculating points for NCDs.
- Valid Number of applications will be considered for calculating points for Equity IPOs
- RTA/HFC data will be considered as final data for calculating points for this contest for all products.
- This contest is applicable for application procured under Edelweiss Syndicate & Sub Syndicate code.
- The loyalty points are not transferable to any other products.
- To qualify for the Loyalty Club, Partner has to disburse the case.
- For Single case : HL & Mortgages loan amount up to 5 crs shall be capped for loyalty points
- All rights for denial of rewards/payouts in the loyalty for any actions by the DSA which are detrimental to the Edelweiss Partners interest.
- All the cases disbursed between 1st April, 2019 – 31st March, 2020 shall be considered
- Loyalty Club points will be considered on net disbursement value.
- The contest is on net mobilization basis. Any redemption, AUM transfer out, cancellation, ceasure, SIP bounce will be deducted to arrive at the final score
- Minimum SIP Tenure need to be 3 Years & above. SIP worth Rs. 1000 and above will qualify for the contest
- SIP with monthly mode only will qualify in this contest
- Switched from liquid to nonliquid will qualify as fresh mobilization
- STP – The net amount received in targeted scheme during the contest period will qualify for the contest
- The list of schemes will continue to be updated on a monthly / quarterly basis.
- Edelweiss Partners has the right to add/delete schemes without any prior notice
- AUM Transfer from other ARN to Edelweiss Partners ARN will not qualify for the contest.
- Unique Investor (PAN) + Unique Scheme will be calculated as one SIP to arrive at the SIP Count
- The final data will be taken from RTA files. Edelweiss Partners is not responsible for missing data in RTA files.
- The contest is valid for all the registered ARN holder of Edelweiss Partners, with a valid EUIN & KYD for mutual fund business.
- All the Mutual Fund application forms / transactions need to bear our ARN 16404 and partner Code, ARN and EUIN of the channel partner. All other products should bear Partner code and Edelweiss code in all transactions.
- All the sub brokers must strictly adhere to the Code of Conduct prescribed by SEBI and AMFI and should not indulge in any malpractice directly or indirectly, contravening the Code of Conduct.



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Thank
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