

Will you rise to the challenge?

J.P.Morgan

J.P. Morgan Asset and Wealth Management Challenge (AWMC) 2018

Information Kit and Competition Terms & Conditions & Rules

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**J.P. Morgan Asset and Wealth Management Challenge (AWMC)
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1. Introduction, Overview, & Participation Details

1.1. Introduction

Before participating in the “J.P. Morgan Asset and Wealth Management Challenge” (from here on known as “JPM AWMC” or the “Competition”), you should read these Terms & Conditions & Rules in their entirety. By completing the registration form, you unconditionally agree to all of these Terms & Conditions & Rules. Additionally, you accept that any and all decisions of JPMorgan Chase Bank, N.A., (acting directly or through its affiliates) (collectively, “J.P. Morgan” or “JPM”) with regard to the Competition shall be final, conclusive, and binding.

1.2. Overview of the Competition

“JPM AWMC” is a competition organized by JPM for Singapore, Hong Kong, China and Taiwan. The aim of the Competition is to offer students a fun, interactive and professional learning experience, and the opportunity to act in the role of an investment specialist of a fictitious asset management company. Students will form a team of 4 members, and they will be given a realistic client case scenario to work with. They are then expected to present or advise their recommendations based on the case requirements.

The Competition will consist of written submissions and presentations. The Competition will be held in three phases – a “University Round”, a “National Round” and a “Regional Round”. The winning team from the National Round of each participating country (Singapore, Hong Kong, China and Taiwan) will be flown in to Hong Kong to compete in the Regional Round. Please refer to “3.1 Event Sequence & Deadlines” for more details on the Competition flow.

JPM reserves the right to change the number of National Round participants at its discretion. The Competition will only be open to eligible students as detailed in these Terms & Conditions & Rules. There is no fee to participate. Teams will not be reimbursed for materials or resources used in the preparation of their submission and presentation.

1.3. Registration form and acceptance of the Terms and Conditions and Rules

Teams shall indicate acceptance of these Terms & Conditions & Rules by completion of the registration form. Acceptance of these Terms & Conditions & Rules by any one Team Member on behalf of the team will be regarded as acceptance to these Terms & Conditions & Rules by the other members of the team. Failure to accept these Terms & Conditions & Rules will prohibit participation in the Competition.

1.4. Competition period

The Competition period is between January to April 2018. Please refer to “3.1 Event Sequence & Deadlines” for more information.

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1.5. Eligible participants

The Competition is open to students who meet the following criteria:

- Planning to complete their undergraduate/postgraduate program in 2018 or 2019 or 2020* or 2021*.
- Students participating in an international exchange program can participate under their host university**.
- Students participating in a local exchange program can participate under their full-time enrolled university*.
- To avoid potential absence, students going on exchange programs to overseas universities **may not** participate as there will be a presentation component to the evaluation.
- Any employees, apprentices, and trainees of any division of JPM, including its subsidiaries, **may not** participate in the Competition.
- The Competition is not open to any faculty/teaching staff.
- The Competition will be held entirely in English, hence competency in English is a pre-requisite.

*As those graduating in 2020 or 2021 will not be in their final or penultimate year in 2018, they will not be eligible for the summer analyst or full time analyst program. **Note: See “1.6. Team composition” for further information.

1.6. Team composition

In the interest of fairness and learning opportunities, the following rules apply to the team membership:

- Students must register in teams of 4 members (“Team Members”).
- Each team must designate a “Team Captain” who will submit the registration form and related details and all relevant submissions for the Competition.
- The Team Captain must accept these Terms & Conditions & Rules upon registration on behalf of all participating Team Members and this will be binding on each member of the team.
- Members of a team must all be enrolled at the same school / university and all Team Members must meet the eligibility criteria as defined (in “1.6 Eligible participants”) above.
- Students participating in an international exchange program can also participate in the Competition provided there is a maximum of one such member per team.
- Students participating in a local exchange program can also participate in the Competition provided they are able to form a team with students from their full-time enrolled university.
- Students are only allowed to register under one team i.e. one student cannot be part of two or more teams.
- Once a team has submitted their application, no modification in its composition will be allowed. The first submission to the JPM Mailbox (awmc.apac@jpmorgan.com) is considered the final submission. The decision made by JPM is final and cannot be appealed.
- In the event that the team is reduced to less than 4 Team Members, the team shall be disqualified. However, JPM reserves the right not to disqualify any team in which a Team Member had a legitimate reason to leave their team, as long as there are at least 3 Team Members with continued participation in the Competition. Whether any reason is considered legitimate is to be decided by JPM in its sole

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discretion, and may include (but not be limited to) illness, accidents, pregnancy, hospitalization, travel (where it is not practical for the Team Member to participate). Certified proof of such circumstances may be required. The decision made by JPM is final and cannot be appealed.

1.7. Proof of eligibility and data provided in registration form

At any stage during the Competition, JPM reserves the right to ask for proof of eligibility, conduct checks on the validity of the information submitted in any registration form, and to ask for proof of data provided in the registration form, such as identification documents, student cards or academic transcripts. JPM also reserves the right to refuse the participation of, or to disqualify, at any time during the Competition, any student (and/or their teams), who have submitted incorrect or misleading information. Teams will have no recourse against any such decisions made.

1.8. Registration Procedure & Winning Team

All teams must register through the JPM website through the link provided within the publicity emailer. Any submission of registration through any other mediums will not be accepted.

1.9. Team withdrawal

If a team withdraws from any round of the Competition, that team will be replaced by the next strongest team from the respective round of the Competition. The “next strongest team” will be determined by JPM based on the Judging Criteria (see “1.21 Judging Criteria”) as used for the respective round of the Competition.

1.10. Awards

Awards will be presented to the eligible teams within 4 weeks after the Competition. Any team who withdraws from the Competition or is disqualified will not be entitled to any awards from any round of the Competition. All decisions made by JPM regarding awards are final and cannot be appealed. JPM reserves the right to retract awards.

Any awards are awarded at the discretion of JPM and are non-transferable. Participation in the Competition shall in no way be considered as forming a contractual relationship between any participant, any team, and JPM, and shall under no circumstances result in or imply an employee-employer relationship, an obligation to employ or promise of employment. No cash compensation will be provided.

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1.11. Travel & accommodation

JPM will not reimburse the cost of any travel for any teams attending the “National Round” at JPM premises. Travel dates will be set by JPM. Any cost related to changes in travel dates made by any participant will not be covered by JPM.

As the winning team from Singapore, China and Taiwan will be competing in the “Regional Round” in Hong Kong, JPM will sponsor the necessary airfare and accommodation costs. JPM reserves the right to book the airfare and accommodation for the teams at JPM’s discretion.

1.12. Involvement of J.P. Morgan staff

JPM will assign a direct contact person for students and/or the teams. Officers of JPM Asset Management will judge the “University Round”, “National Round” and “Regional Round”. JPM will provide guidance on the competition process, logistics, marketing, and evaluation criteria. Any support from JPM’s staff to registered teams must be limited to advice on the structure and judging criteria of the Presentation.

1.13. Involvement of professors, school staff, Student Competition Managers, universities

Entries must be the product of a team’s own original work and shall not infringe the intellectual property rights of any third party. Fraud, copying, professional tuition and plagiarizing are strictly prohibited. Unauthorized or excessive assistance will lead to team disqualification. The support given to teams by professors, school or academic staff and/or universities should be limited to the general information relating to finance and must not relate to the case study itself. Professors, school or academic staff will not be present as part of the judging panel for the “University Round”. JPM has sole discretion over disqualification of teams and/or individual participants. The decision made by JPM is final and cannot be appealed.

1.14. Involvement of the Media

Students, teams and/or the universities involved are prohibited from giving or participating in, directly or indirectly, any communication, discussion, response statement or view (whether verbal or otherwise) in relation to the Competition to or through any form of mass media, except with prior authorization from JPM.

1.15. Disqualification

JPM may, at its sole discretion, disqualify a team and/ or any of the Team Members from participating, if the team or any Team Members shows a disregard for these Terms & Conditions & Rules, or acts in an unsporting or disruptive manner as determined by JPM.

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1.16. Consent to Use of Personal Information

In completing the registration form and otherwise providing JPM with any personal information for the purposes of the Competition, the students acknowledge and agree to the terms of JPM's Personal Information Statement (a copy of which is available upon request) and that JPM can collect, use and disclose their personal information for the purposes of administering this Competition and assessing prospective recruitment or employment opportunities. JPM is entitled to rely on any information submitted by the students as true, complete and accurate. If a student provides JPM with personal information of any third party, the student warrants that consent has been obtained from the third party for his/her personal information to be collected, used and disclosed by JPM in the manner set out above. Any personal data collected by JPM will not be shared with any third party. Individuals who have provided personal information to JPM have a right to access and correct their personal information collected and held by JPM. To exercise this right, it suffices to send us an e-mail with proof of your identity to the JPM Mailbox. Personal data collected shall be subject to the data protection policies of JPM, and shall cease to be retained if their retention no longer serves the purpose for which the personal data was collected, and retention is not necessary for legal or business purposes.

1.17. Limitation on responsibility and liability

JPM is not responsible for incomplete, late, or misdirected registrations. To the fullest extent permitted by law, JPM shall not be responsible or liable for any damage, loss or expense arising from or in connection with: (1) any access, use or the inability to access or use the Competition website, or reliance on the contents of website; and (2) any system, server, connection, hardware or software failure, error, omission, interruption, delay in transmission, computer virus or other malicious, destructive or corrupting code, agent, program or macros. JPM, in its sole discretion, reserves the right to suspend, cancel or modify the Competition without notice or liability if the integrity of the Competition is compromised in any manner as determined by JPM, or if the Competition is not capable of being conducted as intended by JPM. Any dates, times, or participation details mentioned are for information only and are subject to change.

1.18. Release of Liability

All Team Members release JPM and its respective parents, affiliates, subsidiaries, officers, directors, agents, employees, and all others associated with the development and execution of this Competition, from any and all liability with respect to, or in any way arising from, this Competition and/or acceptance or use of the prize, including liability for injury, death, damages, loss, expenses, except to the extent that such event is directly attributable to JPM's fraud, gross negligence or willful misconduct. JPM is not responsible for prize quality or utility.

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1.19. Judging Criteria

Judging Criteria will be established by JPM and will be made known at the release of the case write-up on January 31, 2017. JPM, in its sole discretion, reserves the right to amend the Judging Criteria at any stage of the Competition without notice.

1.20. Governing Law

These Terms & Conditions & Rules shall be governed by, and construed in accordance with, the laws of Hong Kong Special Administrative Region. Any dispute regarding these Terms & Conditions & Rules will be subject to the non-exclusive jurisdiction of the courts of Hong Kong Special Administrative Region.



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2. Submission of Materials and Presentations

2.1 “University Round” Submission

Each Team must prepare a PowerPoint presentation alongside a written report on the case provided.

The PowerPoint presentation (“Presentation” and to be submitted in Adobe® PDF format) must:

- be no longer than ten (10) slides on A4 sized paper (210mm × 297mm, 8.27” × 11.69”), with no appendix, but inclusive of a cover page and agenda pages (not included in page count);
- include the following information on the cover page:
 - Team Name (as submitted at registration)
 - Name and anticipated graduation year of each team participant
 - University Name
 - Date of Submission;
- contain only publicly available information:
 - All publicly-sourced information must be properly cited using the Chicago Manual of Style in the Bibliography page to be included in the Executive Summary (see below);
- be the original work of the Team Members; and
- be submitted to the JPM Mailbox by the deadline established when the case study is released.

The written report (“Executive Summary” and to be submitted in Adobe® PDF format) must:

- be no longer than one (1) page on A4 sized paper (210mm × 297mm, 8.27” × 11.69”) with no more than 600 words, and not inclusive of the front cover and Bibliography;
- include the following information on the cover letter:
 - Team Name (as submitted at registration)
 - Name and anticipated graduation year of each team participant
 - University Name
 - Date of Submission;
- contain only publicly available information:
 - All publicly-sourced information must be properly cited using the Chicago Manual of Style in the Bibliography page to be included in the Executive Summary;
- be the original work of the Team Members; and
- be submitted to the JPM Mailbox by the deadline established when the case study is released.

Submission of all documents to JPM Mailbox must not exceed 10MB.



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The Video Submission (“Presentation”):

- must be no longer than the allotted duration of five (5) minutes from the initialization of the video recording. At the end of the allotted duration, the video would automatically cease recording.
- will include a maximum of three (3) attempts per team. The team will be required to submit the latest attempt via the online ‘Yello’ Portal
- must feature all members of the registered team who meet the eligibility criteria as defined (in “1.6 Eligible participants”). In the event that at least one member in the team does not feature, JPM reserves the right to disqualify the team.
- requires every team member to be dressed in business casual and to speak during the video presentation.
- must be submitted via the online ‘Yello’ Portal by the deadline established when the case study is released. JPM reserves the right to disqualify teams who fail to do without valid reason.
- must not include any offensive, derogatory or abusive information, images, or acts. Any submissions found to contain any of the above mentioned materials or information deemed inappropriate will be not be considered

2.2 “National Round” Presentations

Each Finalist team must be available to present to an Executive JPM panel of judges for 30 minutes in their respective country between February 23 to March 5, 2018. The National Round may be a development of the submissions of the University Round. JPM reserves the right to release full details of this presentation upon announcement of Finalists. No alternative dates or timings will be accommodated. If a team is not able to attend the National Round finals between February 23 to March 5, 2018, then they will be replaced by the next strongest team which will be determined by JPM based on the Judging Criteria as used for the National Round.

2.3 “Regional Round” Presentations

The winning team from each country will be flown in to Hong Kong to compete in a Regional Round, whereby they will present to an Executive JPM panel of judges for 30 minutes on March 23, 2018. No alternative dates or timings will be accommodated. In the event that some members of the winning team of the National Rounds are unable to make it for the Regional Round, the teams are allowed to replace up to 2 members. If the winning team of the National Rounds has more than 2 members who are unable to make it for the Regional Round, JPM reserves the right to select other teams from the National Round to compete in the Regional Round.

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3. Event Timeline & Deadlines

Date	Detail
Registration	
December 13, 2017	Registration opens
December 18-20, 2017	On-Campus Launch event in China Schools with Q&A session on the Competition
December 27-29, 2017	On-Campus Launch event in Taiwan Schools with Q&A session on the Competition
January 22, 2018	On-Campus Launch event in Singapore Schools with Q&A session on the Competition
January 15 - February 1, 2018	On-Campus Launch event in Hong Kong Schools with Q&A session on the Competition
February 2, 2018 (11:59AM HKT)	Closure of registration
University Round	
February 2, 2018 (3:00PM HKT)	Release of case write-up, Judging Criteria, and reference resources to registered participants for "University Round"
February 11, 2018 (11:59PM HKT)	Deadline for online submission of PowerPoint Presentation, Executive Summary of University Round to JPM Mailbox ('awmc.apac@jpmorgan.com') and online Video Submission of the University Round via the online 'Yello' Portal.
Singapore National Round	
February 14, 2018	Shortlist of "National Round" Finalists for Singapore, announcement of development case study (if any), and notification of mentor assignment
February 21, 2018 (11:59PM HKT)	Deadline for Singapore National Round Submission
February 23, 2018 (Morning to Afternoon)	Singapore National Round to be held in JPM premises
China National Round	
February 14, 2018	Shortlist of "National Round" Finalists for China, announcement of development case study (if any), and notification of mentor assignment
February 26, 2018 (11:59PM HKT)	Deadline for China National Round Submission
February 28, 2018 (Morning to Afternoon)	China National Round to be held in JPM premises

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Taiwan National Round

February 21, 2018	Shortlist of “National Round” Finalists for Taiwan, announcement of development case study (if any), and notification of mentor assignment
February 28, 2018 (11:59PM HKT)	Deadline for Taiwan National Round Submission
March 2, 2018 (Morning to Afternoon)	Taiwan National Round to be held in JPM premises

Hong Kong National Round

February 23, 2018	Shortlist of “National Round” Finalists for Hong Kong, announcement of development case study (if any), and notification of mentor assignment
March 2, 2018 (11:59PM HKT)	Deadline for Hong Kong National Round Submission
March 5, 2018 (Morning to Afternoon)	Hong Kong National Round to be held in JPM premises

Regional Round

March 20, 2018 (11:59PM HKT)	Submission of finalized Presentation and Executive Summary for Regional Round to JPM Mailbox ('awmc.apac@jpmorgan.com')
March 23, 2018	Regional Round to be held in JPM HK premises

JPM reserves the right to change, add, or cancel any events or deadlines without notice or explanation. The decision made by JPM is final and cannot be appealed. *HKT = Hong Kong Time

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Please sign below to indicate that you have read, understood and agree with the Terms and Conditions listed in this document:

Signature: _____

Date: _____

Name: _____

Signature: _____

Date: _____

Name: _____

Signature: _____

Date: _____

Name: _____

Signature: _____

Date: _____

Name: _____

