



PORTIA Referral and Reference Program – Asia

The PORTIA Client Referral and Reference Program – Asia can earn you points towards free training and consulting days, passes to the PORTIA Global Client Conference or a host of other awards. Simply refer a prospect to a PORTIA Relationship Manager, or provide a reference to a PORTIA prospect and start earning points!

Refer A Potential Portia Client Today!

You can start earning points right away by participating in one or all of the activities below – A qualified referral, a reference phone call or on-site visit. You will receive points immediately upon completion of the activity. As an added bonus, you will receive even more points if the prospect signs a contract to purchase PORTIA. Call your Relationship Manager today for more information or to start participating!

Reference Activity	Points Associated	If the Referral Purchases PORTIA, You Will Receive
Qualified Referral Refer a prospect at a firm other than your own who is considering the purchase of a new portfolio management system	2,000 points	10,000 points
Provide a New Client Reference Serve as a reference for a PORTIA prospect, and participate in a conference call	1,000 points	2,000 points
Module or Upgrade Reference Serve as a reference for a current PORTIA client, and participate in a conference call	500 points	1,000 points
On-Site Visit Host an on site visit for a PORTIA prospect	3,000 points	4,000 points



Early Adopter Program:

Clients who actively participate in the PORTIA Early Adopter Program will be eligible for the following (per company):

Activity	Points Associated
Participation in Design Calls (60% attendance)	2,000
FRC 1 - Provide feedback on all new functionality and modules associated with FRC1	500
FRC 2 – Provide DB and feedback on all new functionality and modules associated with FRC2	1,000
FRC 3- Provide DB and feedback on all new functionality and modules associated with FRC3	1,500

- All points for the Early Adopter Program are cumulative – Participation in all activities equal to 5000 pts

Reward Options (Asia):

As you accumulate points you can redeem them at any time for the following awards:

Awards	Points Needed
A \$200 American Express gift certificate	1,000
MS Live Training Session	2,000
One day of PORTIA Regional training	3,000
One Free Pass to PORTIA Global Client Conference	6,500
One Day of On-site PORTIA Training	10,000
One PORTIA Test System Upgrade	20,000
Credit toward your next purchase of a user license or module ----- (Available points x 50% = credit, to a maximum of \$10,000 on any purchase)	TBD

PLEASE SEE PROGRAM RULES AND REGULATIONS



PORTIA Referral and Reference Program Rules and Regulations

Please note that Thomson Reuters reserves the right to change this program at any time.

1. A "qualified referral" is defined as: a prospect with a budget and plan to purchase a Portfolio Management or Performance system. In addition a demo of PORTIA must occur at Thomson Reuters or at the prospect site within 90 days after the referral is provided to Thomson Reuters. The client should provide the referral information to Thomson Reuters in writing on company letterhead. To earn points if the qualified referral purchases PORTIA the sale must take place within one year of the notification letter
2. After a reference call or visit has been performed, please complete a Client Reference Form to notify Thomson Reuters of this and other related information to the event. For clients wishing to redeem points, a Point Redemption Form should be completed and signed by an authorized employee of your firm. Both forms are available on the Thomson Reuters Web page or from your Relationship Manager. Please fax the completed forms to your Relationship Manager
3. Awards for training and consulting days or admittance to the PORTIA Users' Conference do not include travel expenses - it is the client's responsibility to pay for travel-related expenses for either your personnel or Thomson Reuters staff
4. Percentage-based awards are based on the US dollar equivalent of the original contract value to ensure the program has the same value in all countries and currencies
5. Clients participating in more than one reference activity with the same prospect shall receive points from the higher point activity only
6. A maximum of five (5) American Express gift certificates will be awarded per client in any one calendar year
7. Consulting awards are limited to a maximum of two (2) days per year of staff consulting. Training at the client site is limited to two (2) days per year. All training and consulting awards are dependent on availability
8. This program takes effect on August 1, 2007. Points from other reference programs prior to this one are subject to the guidelines of those programs
9. All referral points expire within three years from the date of the reference provided or the date of the letter notifying Thomson Reuters of a qualified referral
10. Referral can not be from the business unit that is searching for new portfolio management system