



# INDIA BOL RAHA HAI MUTUAL FUND KI BHASA

## Mutual Fund Fast Fact of India

### Productive-youth : The game changer

35% of the world's youth live in India of which 54% are below 25 years of age 33% are productive youth.

**GAME  
CHANGER**

### The scope

Insurance Agent > 15 Lacs  
Mutual Funds Agents < 1 Lac.

### Results speaks - AUM Growth

Mutual Fund AUM : ₹ 6.64 trillion as on  
31st May 2009 to  
₹25.94 trillion as on 31st May 2019,  
almost 4 fold increase  
at span of 10 years.

(Source: AMFI)

\* As on 30.06.19

### SIP

Today SIP's don't require an  
introduction. Market is asking  
"SIP A/C HAIN KEYA"?

SIP Monthly contribution  
is ₹ 8,122 crore.

(Source: AMFI)

\* As on 31.03.19

**WE PRACTICE 'TRUTH'**

Mutual fund is subject to market risk. Please read all scheme related document carefully

# OUR MISSION VISION & VALUES



## OUR MISSION

We aspire to become a leading financial intermediary by partnering in your wealth creation efforts through wealth coaches and to provide Financial Freedom at Retirement Life for every citizen of India.

## OUR VISION

- We envision ourselves to become leading corporate house with retirement planning solutions.
- We aim to provide cost-effective professional services to satisfy our wealth coaches and clients.
- We hope to build a trusted relationship with all our associates.

## CORE VALUES

- **Truth:**  
We Practice TRUTH and operate with absolute integrity.
- **Belief:**  
We believe the principal - "बहुजन हिताय बहुजन सुखाय"
- **Passion :**  
Passionate and enthusiastic towards learning
- **Commitment:**  
On producing time bounded results.
- **Excellence:**  
We strive towards excellence for all our wealth coaches & clients.

# WHAT OUR WEALTH COACH'es SAY !!



**Subhra Kanti Das**  
ARN- 23043

"**Regular & powerful training** with Saffollya in Financial Planning & Calculations made me confident in not only in MF business but **overall** growth in other segment like LIC & Health Insurance. **IAP** with Saffollya also helped me for new client acquisition & expansion of business."



**Subhendu Sekhar Nanda**  
ARN- 80442

"In association of last one year I've found Saffollya with very **effective & organized in knowledge** development in the field of personal finance & **comprehensive financial planning**. The **service team** is very friendly, knowledgeable & supportive."



**Krishna Gopal Pal**  
ARN- 137956

"Very **smart distributor portal** with training to use the same, different reports & presentation, very supportive **back-office** system is helping me to grow my MF business. Servicing the clients through Online, **mobile app** & back-office support system is a wonderful feeling so far. Thanks to team Saffollya on assistance me on clearing **AMFI exam**."



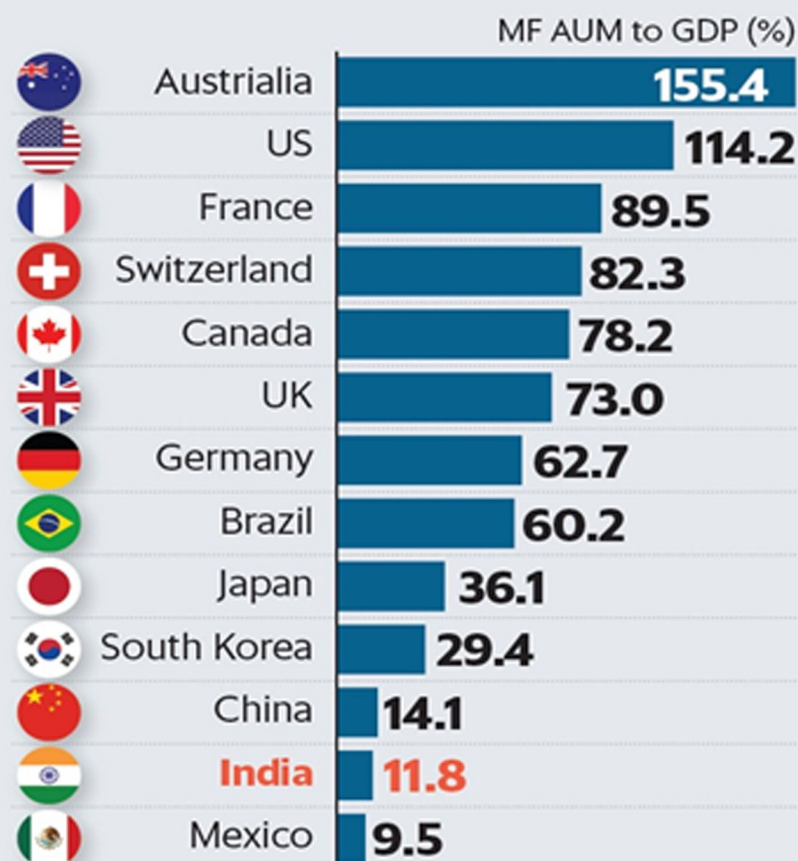
**KDM Tripathi**  
ARN- 159730

"My entire **back office work** in MF business is taken care of by Saffollya. And hence I get to spend quality time meeting my clients. Away some mobile app of clients is also a great tools for my clients and generates referral business. The **AMFI module** is also unique. Very transparent, & bias-less buisness policy attracts me."

# PENETRATION OF MUTUAL FUND INDUSTRY IN INDIA

## UNDER-PENETRATED MUTUAL FUNDS MARKET IN INDIA

Mutual funds' assets under management as a percentage of GDP growth is a typical indicator used to show low penetration of mutual funds of a country



Source: Bloomberg, 2018 Investment Company Fact Book; Assets under management pertain to open-ended funds



Population in India  
below 35 years



Equity Savings  
only



MF Distributors  
in India only

# WHY INVEST THROUGH MUTUAL FUNDS

**"Tax-Savings ke lie  
Mutual Funds sahi hai"**

**"Sirf Rs.500/- se shuruwat  
kar sakte hai"**

**"Phone  
se bhi online  
invest aur  
withdrawl  
kar  
sakte hai"**



**"Thora-Thora karke bhi  
invest kiya jaa sakta hai"**

**"Planning long-term karni ho  
yaa short-term"**

**Sabke liye MUTUAL FUNDS *Sahi Hai***

# WHO ARE WE

## Our Inspiration:

All big leaps start from a small motivation.  
So did Saffollya and this is the story of our amazing journey so far.  
Mrs. Hashi Rani Kundu was the motivator for this giant leap by founder  
Arabinda Kundu.  
Every mother knows what is best for her child.  
She was indeed a visionary who envisioned  
the birth of this endeavor. with a pic of my mother.



Lt. Hashi Rani Kundu

**ARABINDA KUNDU**  
CEO, Founder of  
Saffollya Investment Advisory LLP



## JOURNEY OF SAFFOLLYA

**2006**

### A Brief History

Mr. Arabinda Kundu started working from home as an Individual agent in the domain of Personal Finance.

**2008**

### Building Up

Started conducting Investor's Awareness Programmes on Personal Finance. More than 6000 people were benefited.

**2009**

**Something Big**

Saffollya established its own office with few employees, joined IIOE, Wealth Forum and achieved MDRT for the very first time at a global conference in USA and it proclaimed its arrival on the BIG SCREEN.

**2010**

**Certifications**

Became an Associate Financial Planner in Risk Management and Retirement Planning from FPSB

**2011-13**

**New Programmes**

Launched programmes like Customized Investment Planning, Retirement Planning for clients and Individual Tax Saving Advisory Services

**2014-17**

**Awards & Accolades**

Summon Award by MFRT in 2014.  
Apollo Munich awarded us at Bali, Indonesia & Thailand in 2016.  
SIP Champion Award at Phuket.  
Advisor of the Year & SIP Champion at Hong Kong from RMF.  
Apollo Munich again rewarded us at Singapore this year.

**2017**

**Year of Expansion**

Got much awaited Corporate License as Saffollya Investment Advisory LLP. And started advising Corporates.

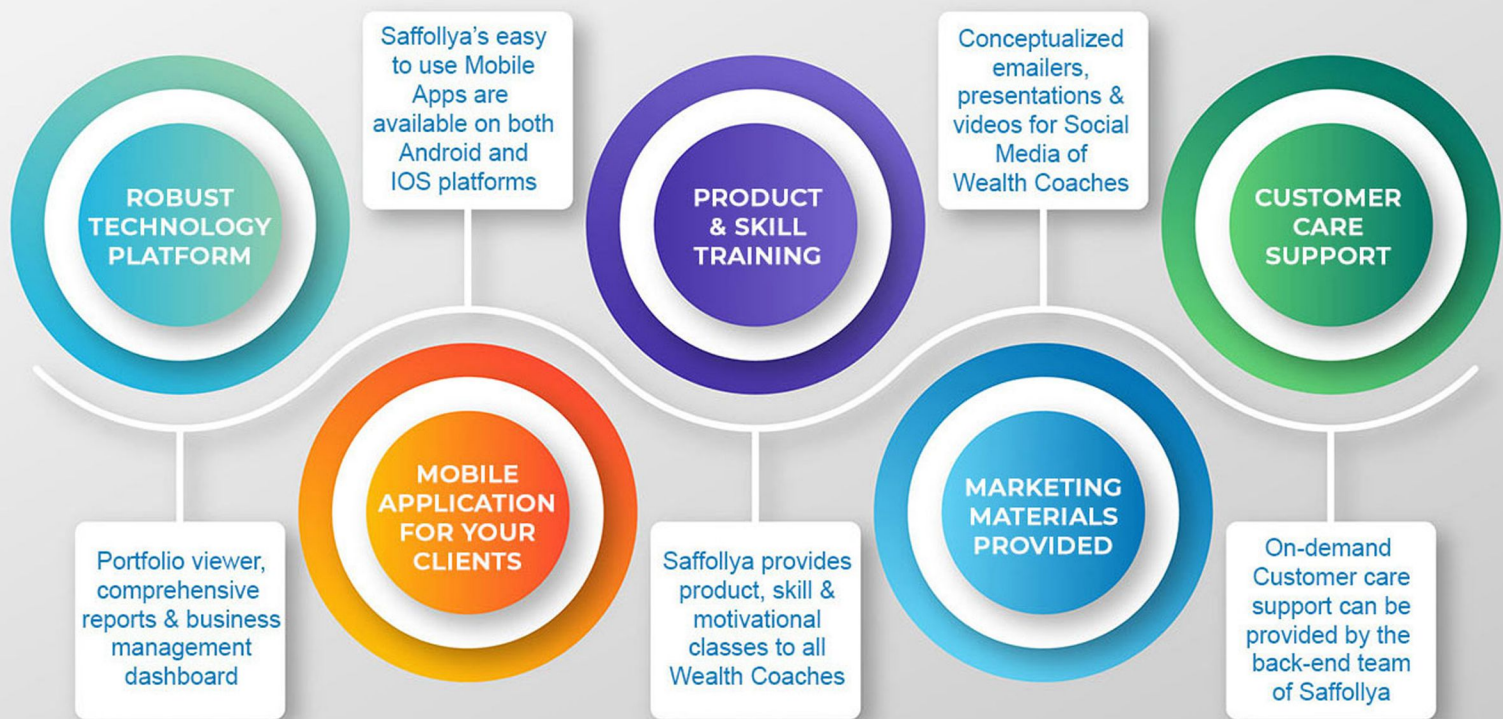
**2018**

**The Army Grows**

The Saffollya's team of employees and **Wealth Coaches grows to 50.**  
Started AMFI training  
Record success in AMFI module - **38 passed out out of 39**  
AMFI Aspirant with assistance of Saffollya.

# WHY JOIN SAFFOLLYA AS MUTUAL FUND ADVISOR

Partner with Saffollya and get the Edge



## Benefits to Wealth Coaches

- Robust Technology Platform.
- Business Management dashboard
- Customer Care support
- Product, Skill and Motivational training

# MARKETING SUPPORT

**SAFFOLLYA**  
Investment Advisory  
Partnering in your financial success...



## Co-Branded Meet with Wealth Coaches for Client Aquasition

**MUTUALFUNDS**  
Sahel Hal

**"Planning long-term karni hai ya short-term."**

**Nimai Ranjan M**  
98300 339

**SAFFOLLYA**  
Investment Ad  
Partnering in your fir

Visit : [www.saffollya.com](http://www.saffollya.com) ■ Like : [f/saffollya](#)

**RETIREMENT PLANNING WHY?**

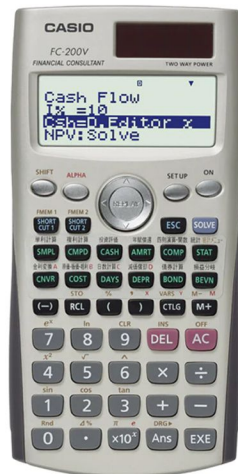
**Are you ready for 30/30 CHALLENGE**

Working Age 25 to 55  
Retirement Age 55 to 85

Subhendu Sekhar Nanda | 97485 90890

## Financial Calculator

This little tool just  
make you a  
Professional  
Financial Advisor



**Personalised  
Pitchbooks to  
our  
Wealth Coaches  
for Marekting**



# Training, Award & Recognition Program

**SAFFOLLYA**

Aap bas life goals plan karo aur  
**SAMJHO HO GAYA.**  
Mutual Fund SIP

- Start as low as Rs.500/- p.m.
- Get a Return of 12-15% CAGR.
- Tax Benefit.
- Savings ka naya tareeka.

LIFE GOALS. DONE.

Subhra Kanti Das | 98301 52906

**SAFFOLLYA**

MONTHLY INVESTMENT REQUIRED TO ACCUMULATE 1 CR in 20 yrs.

Investment Type	Monthly Investment (Rs.)	AVG ROI (%)
BANK RD	Rs.19,766	6.75%
PPF	Rs.17,701	7.66%
SIP	Rs. 6,771	15%

Past Performance of 42 Schemes last 20 yrs.

Krishna Gopal Pal | 91230 01125

Weekly marketing  
Colletral for  
Whatsapp Broadcasting



**SAFFOLLYA**

Don't miss the opportunity to make a handsome return in the  
**VOLATILE EQUITY MARKETS**

Solution:  
Invest LUMP SUM or SIP/STP to  
**EQUITY** schemes now

INVEST NOW

Avijit Paramanick | 98744 45752

**DON'T WAIT FOR YOUR TURN AT A GAMESHOW.**

**SIP**

BECOME A "CROREPATI" BY STARTING SIP IN MUTUAL FUNDS @ JUST ₹5000 PER MONTH!

Parameter	Value
SIP AMOUNT (₹)	5000 PER MONTH
DURATION	25 YEARS
AMOUNT INVESTED (₹)	15 LAKH
ANNUAL RATE OF RETURN	15%*
TOTAL VALUE (₹)	1.42 CRORE
GAINS/PROFIT (₹)	1.47 CRORE

\*CIP: Systematic Investment Plan

For Details Call @ **SK Anwar Hossain | 98300 87149**

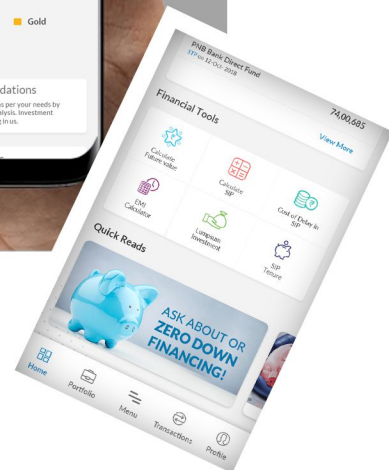
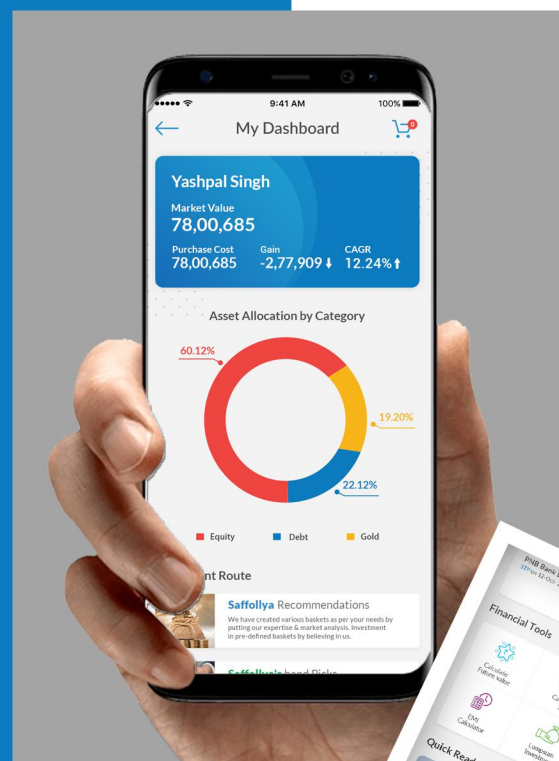
# SAFFOLLYA'S MOBILE APP & WEBSITE



Are you working for money or **money working for you**

Through this you can:

- ✓ View/Manage your Portfolio.
- ✓ Transact hassle free Investments.
- ✓ Calculate the SIP amt for the goal you want to achieve.
- ✓ Suggestion for the best schemes that suits your need.



FOR CLIENT AS WELL AS  
**PARTNERS**

Get Our Mobile App:  
**Wealth Magic**



# CO-BRANDED MARKETING SUPPORT



# AMFI TRAINING SUPPORT PROGRAM





**WE LEARN,  
WE ENJOY,  
WE PERFORM  
WE ARE A FAMILY .....**



**BELIEF :**

**“बहुजन हताय  
बहुजन सुखाय”**

**FOR THE HAPPINESS OF THE  
MANY, FOR THE WELFARE OF THE MANY**



# SOME GLIMPSE OF TRAINING PROGRAM



**"An organization works on the principal of  
BIASNESS ONLY TO CLIENTS NEED -  
NOT PRODUCT RECOMMONDATION"**



# OUR UNIQUE & BEST AMFI SUPPORT SYSTEM



Clear exam easily with our 7 day  
AMFI training

Access to VP Desk with Real time  
mock test



Easy to read notes with FAQ's

Telephonic support for quick  
solutions before final exam



99% of our candidates succeed in  
AMFI Examinaton

## Why choose Us?



50<sup>+</sup>

PARTNERS



2000<sup>+</sup>

CLIENTS



3

BRANCHES



50<sup>+</sup>

CITIES

# WHY SAFFOLLYA

## SUMMARIZE

Get Marketing Tools  
with your Own Branding



Online  
Transaction Facility



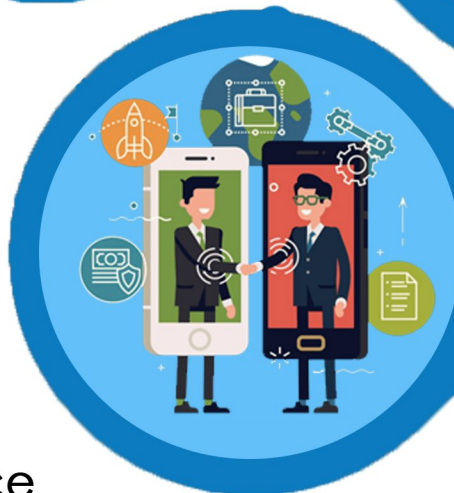
Regular Trainings &  
Meetings



Regular Research  
& Technology



Mobile Application  
with Strong Back office



Reward &  
Recognition program





# OUR RECOGNITION & FEEDBACK

" **FEEDBACK** is a gift.

**IDEAS** the currency of our next success.  
Let people see you value both feedback  
& Ideas.

# WHAT OUR WEALTH COACH'es SAY !!



**Bijay Srivastava**  
ARN- 7392

"What a **smart AMFI training program & course material** Saffollya have designed!!! It's simple non-comparable. The **sales kit** including customized **pitch-book** & financial calculations with **FC 200V** calculator are also excellent tool to build investment consultation business."



**Alope Roy**  
ARN- 86327

"**Extremely easy & clever design of web-application & mobile app** of saffollya. It has everything you need to know about investment. **Away some supportive back-office team** helps a lot in building MF business in full digital way."



**Sanjib Ghosh**  
ARN- 137953

"Smart Marketing support through **client meet, digital tools, Prospecting through china-egg** procedures and overall learning helping to grow our **MF & insurance business**."



**Shirsendu Bhattacharya**  
ARN- 159729

"Business atmosphere – very friendly & supportive. **Group client meet & IAP – Unbiased, very powerful for acquisition & retention clients.** Training system – Great & helpful to any advisor to grow overall business in **personal finance** with Life & Health insurance along with MF."



**Sanjoy Halder**  
ARN- 64956

"**Saffollya stands for TRUST** to me. Wonderful & unique training system is helping me to visualize my future carrier in a different way. Saffollya even helps us to **develope our back-office system** with proper training to our office-staff. **Great practical application** of learning of my 33 yrs of carrier."

# WHAT OUR WEALTH COACH'es SAY !!



**Indrani Roy**  
ARN- 159283

"AMFI pass through Saffollya was very exciting. Instant effective presentation with **Financial Calculator** & customer **mobile app** for digital business, client acquisition is really very powerful weapon for me in my advisory business."



**Ashok Kumar Modak**  
ARN- 161105

"AMAZING SYSTEM FOR AMFI Program. Excellent **service, support system, proper education on MF and other financial products** has really made me confident in my advisory business. Feeling proud in association with **Mission** of saffollya's of **Happy retirement life of every Indian.**"



**Avijit Paramanick**  
ARN- 136941

"I manage my MF business in association with Saffollya. Saffollya's team has been instrumental in helping me educate my investors financially through regular **Investor awareness sessions & activities.**"



**Tanmoy Biswas**  
ARN- 160900

"Engagement as an investor for more than 4 years, & now as an advisor with Saffollya, I feel SAFFOLLYA'S main motto is to **fulfill financial dreams** of Clients & advisors by providing **user friendly online portal, mobile-app** with continuous support by fully digitalized, **well trained & positive back office.** Thanks to team SAFFOLLYA for improving my knowledge in financial planning, & building a business through **public relationship.**"



**Mukul Shaw**  
ARN- 137947

I am Association with Saffollya since last 2 yrs I've learn many **soft skills of marketing, communication** etc. I have built a strong business with high focus on SIP. **SIP is a win-win situation** for my investor, for me as well for the fund manager."

# SUBSCRIPTION

## CHARGES & BENEFIT

### Plan A (For ARN Holder's) :

#### Benefits of Wealth Coaches:

- Mobile app for all clients.
- Very competitive commission sharing.
- Support to arrange client-meet or IAP.
- Dedicated RM for back-office system & Marketing.
- Complete security of data of your business & clients.
- Access to our wealth-coach portal to manage the business.
- Soft copy of visiting card, letterhead, co-branded promotional leaflet.
- 360° back-office support system (Online, Offline, logistic) to do MF business.
- Sales Kit including customized Co-Branded laminated pitch-book, Sales Tools etc.
- 30 full day local or outstation workshop during 12 months on **Products, uses of web-portal, Financial Calculator** etc.
- Different product basket selling access such as – MF, FD's, Financial Planning, Estate Planning etc.

**Lifetime Subscription charges Rs.-3,000/-+GST**

### Plan B (For Non-ARN Holder's) :

(Who want to clear AMFI with assistance of Saffollya)

#### Benefits Provisional Wealth Coaches or AMFI Aspirants)

- Supply of required study materials.
- Instruction of "NOT-TO DO" to clear exam.
- Registration with NISM for MF advisor module.
- Assigning of Well-experienced coaches to clear EXAM.
- Real time training of in MF back office & digital business system.
- 6000 Nos. practical Mock-test paper before appearing final exam.
- **4 day whole day training** for AMFI exam clarifications ( Incl. food & Night stay arrangements – if required)
- Required assistance to get ARN card including KYD complete

**Lifetime Subscription Charges – Rs.-8,000/-+GST** (ARN fees, presently INR 3,450/- to be paid by applicant)

#### Documents required registering as wealth coaches:

- Self attested PAN, AADHAR, And ONE COPY PP PHOTO, Bank cancelled check, ARN card (for ARN holder)

#### Bank Account Details of Saffollya:

A/c Holder Saffollya Investment Advisory LLP

Bank's Name Axis Bank

Branch : Shyamnagore A/c No. : 91720078450032 IFSC : UTIB0001488 MICR : 700211068



**THANKS HOPE TO GET AN OPPORTUNITY  
TO WORK WITH YOU**

## **CONTACT US**

**Arabinda Kundu - 93310 08884**

**Abhishek Das - 62900 88649**

**For more details please visit:  
[saffollya.com](http://saffollya.com)>partners page**



## **FOLLOW US ON**



**/SAFFOLLYA**



**SAFFOLLYA**



**SAFFOLLYA INVESTMENT  
ADVISORY LLP**

**WE NEED YOU!  
TO MAKE IT HAPPEN**