

With Best Compliments from.....

Personal Finance & Portfolio Management Services

- Mutual Funds
- Life Insurance
- Health Insurance

TO KNOW MORE



Advisory Services:

(Variable Fee Based)

- ✓ Comprehensive goal based **Financial Planning**.
- ✓ **Cash-flow, SWOT & risk-appetite** analysis.
- ✓ Customized **product recommendation**. **Re-alignment** of existing investment & with risk appetite & objective.
- ✓ Understanding **disclaimer cum risk** of mutual fund and other products. Income Tax consultation with **capital gain reports** as per as investment perspective.
- ✓ Investment risk management through **STP** & activation of trigger of robotic profit booking.
- ✓ Comprehensive **Insurance Planning & Insurance Need analysis** with recommendation.
- ✓ Customized **mobile app & login id for investment management** with **portfolio tracker** incl. family members' along with **document manager**.
- ✓ **24 Hrs online and pan-India based service** with registered mobile and mail id.

We work & earn as distributor/ agent of Mutual fund, insurance and other Financial products.

“We Practice TRUTH”



Remarks.....

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Transactional services:

(Free services offered for guest in this event)

✓ Mutual Fund & other investment:

Update:

KYC, KRA, FATCA, nomination, bank account, OTBM, contact details etc.

Services:

unpaid dividend claim, folio merge, scheme switch etc.

✓ Life & Health Insurance:

Update:

Nomination, KYC, Contact details, Bank, NACH etc.

Services:

Unclaimed SB, Branch Change, revival, premium paid statement, loan against policy maturity, death claim assistance.

✓ Health Insurance:

Claim assistance, claim submission, legal assistance, policy porting etc.

Solution we offered:

(Goal / Objective based)

(Disclaimer: We earn commission from selling insurance & investment products)

✓ Insurance products :

Life, General: car, personal accident, travel, Health - group, Sr. citizen, family, floater etc.

✓ Tax-savings instrument

u/s 80 C, 80 D, 10/10/D, 54EC (long-term capital gains)

✓ Recurring deposit,

SIP (Systematic Investment Plan) through Mutual Funds

✓ Debt Investment – FD, RD,

Postal Investment, Mutual funds etc.

✓ Monthly income scheme – LIC, PO, Deposit, Mutual Fund.

Investment in different asset class like Debt, Bond, Balanced, Gold, Equity etc.