

Plan A (For ARN Holder's) :

Benefits of Wealth Coaches to their Clients:

- Saffollya Portal - login with features like investment planning calculations, MF research tools, integrated portfolio view of family, Different reports generation, digital document upload & download etc.
- Saffollya portal - as portfolio manager, of self and family members, for FD's, insurance, Bonds, NPS etc form along with mutual funds.
- Mobile app: Exclusive mobile app with most features of Saffollya portal, direct reach to CC, Referral Bonus by referring tagged WC.
- Online: KYC, Mandate, MF transactions.
- Dedicated customer care email: care.saffollya.com
- Dedicated Wealth Coach to Protect, Preserve & Create Wealth.

Benifits as Wealth Coaches :

- Partner cum EUIN Based Business model.
- Very exclusive Commission payment – Sharing basis.
- Saffollya Portal & mobile app login to manage business as wealth coach.
- Exclusive 360° training & workshop to re-build advisory business in MF with insurance.
 - > Courses like Fundamental, Basic, Advance
 - > Calculations with Financial Calculator (FC 200 V),
 - > Combination (MF with insurance)
 - > Health Insurance (Product, exclusion, claim),
 - > Corporate
 - > Taxation
 - > Bridge course, Boot Camp.
 - > MF Transactional training to Staff of WC.
 - > Assistancess to renew ARN in stipulated time.
 - > Support to complete RIA, CFP and other Professional Courses as Investment advisor
- Client end operational support & Service status reporting by trained, dedicated AMFI qualified Back-end operation team.
- Hand-holding to develop MF business of WC's with support of dedicated RM and Business Development Team.
- Client Engagement support through online / Offline one to one / group client Meet, Investor Awareness Program, Financial Planning, Customer care support.
- Co-lateral marketing materials for products / promotions / awareness.
- Business Data Security – we are committed.
- Soft copy of visiting card, letter head,
- Customized Pitch book with marketing kit.
- Different Product Basket: MF, NPS, Bonds, Deposits, Health Insurance, Life Insurance & others.

Lifetime Subscription charges -
~~Rs. - 6,000/- + GST~~
Rs. - 4,000/- + GST

Wealth Coach's
#Joining
Subscription's
& charges



Refund & Cancellation Policy in
Subscription Charges :

- We're so convinced you'll absolutely love our services as a wealth-coach with us.
- Still we offer Un-conditional full refund (excluding TAX paid) within 6 months from date of payment received from wealth coaches on having dissatisfaction or not willing to do business with us.

Contact Us @

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Bank Account Details of
Saffollya -o- Samriddhi:

A/c Holder - **Saffollya O Samriddhi LLP**
Bank's Name - **Bandhan Bank**
A/c No. : **10210002123546**
IFSC Code : **BDBL0002178**
Branch : **Shyamnagar**

Plan B (For Non-ARN Holder's) :
(Who want to clear AMFI with assistance of Saffollya)

Benefits Provisional Wealth Coaches or AMFI Aspirants)

- Registration with NISM for MF Advisor Module.
- Offline / Online training support through dedicated AMFI trainers.
- Supply of required study materials
- Observation through multiple observers in practice and query session.
- Instruction of "Do, Not do" to clear exam.
- Real time training with observation to generate idea of MF Back office system and paperless business system.
- Real time Mock test support of 6000 no before appearing final exams.
- Guided assistance to get ARN card and completion of KYD process.

+
All Benefits of Wealth Coaches of Plan A
after ARN registration

****Note: AMFI Exam pass rate is above 90% with Saffollya -o- Samriddhi**

Lifetime Subscription Charges -
Rs.- 6,000/- + GST + (any stipulated fees for AMFI exam, ARN issuance etc. have to borne by Wealth Coach / Participant)

Career opportunity as Wealth Coach
in Saffollya -o- Samriddhi



****If you have any questions, concerns, or complaints regarding this refund policy, we encourage you to contact us using the details below:**
<https://www.saffollya.com/contact-us/>