



## Swabhimaan

A Customer & Pocket Friendly Online Financial Planning Solution



Financially Independent Retirement

Children's Higher Education





Tax **Optimization**  John Things \*Financia Children's Marriage





**Family Protection** 

Home **Purchase** 



For the Progressive Indian Families who want to lead a Worry-free and Dignified Life!

EXECUTION ...





## Swabhimaan

A Five Step Online Financial Planning Solution



BASIC GOALS COVERED	ADDITIONAL GOALS (Choose any 3)	SERVICES INCLUDED IN THE PLAN
Emergency & Risk Planning	Children's Higher Education	Lifetime Free Online Tracking & Transaction Platforms.
Retirement Planning	Children's Marriage	Zero Transaction Charges.
Tax Optimization	Home/ Car Purchase	Monthly Portfolio & Half Yearly Review Reports.
	Debt Repayment	Direct access to Financial Planner & Team of experts.
	Vacations	No restriction on amount of investments.
	Any other	Mobile Applications for Tracking & Transactions.

Annual Membership Plan Charges: Only Rs. 6000/- (+ GST)
Next Year Renewal Charges (Optional): Only Rs. 3000/- (+GST)

Optional Services: ITR Computation and E-filing for Salaried person @ Rs. 500/- (+GST).



## Why Adyanta Financial Consultancy?

- ▶ World-Class Technology with a Human Touch.
- ▶ Trusted by over 350 Families spread across the Globe.
- ▶ Need-Based, Scientific & Systematic Approach.

Failing to Plan is Planning to Fail

