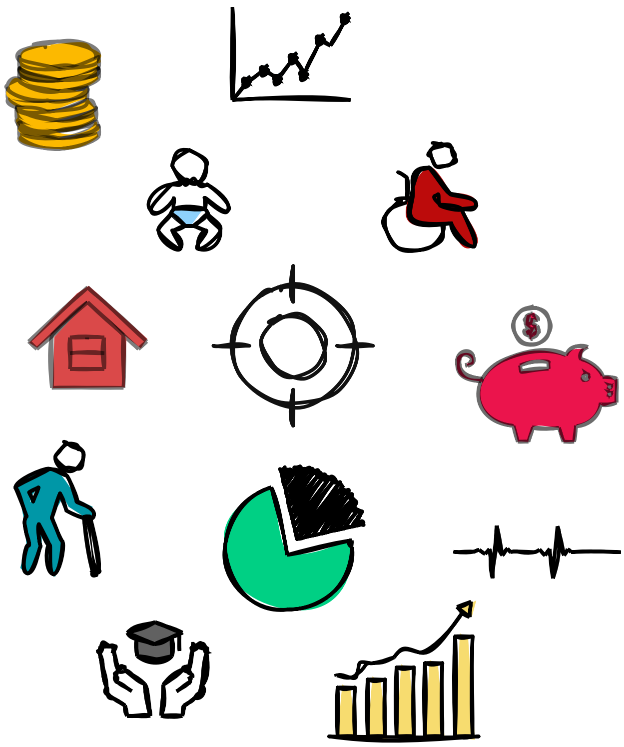
KRISHNA RATH
SEBI Registered Investment Advisor
finvestor.in



SECURE YOUR FUTURE,

PROTECT YOUR LEGACY,

OPTIMIZE YOUR WEALTH.

Fee-Only Financial Planning
No Commissions, No Conflicts

Personalized Plans
For You.

finvestor.in

ABOUT US

1. Our client-centric approach ensures your financial priorities guide every strategy, building trust and confidence
2. We specialize in crafting personalized plans tailored to your unique needs, circumstances, and long-term goals.
3. We are committed to providing transparent guidance and building long-term partnerships for your financial success.

FINANCIAL PLANNING

Financial planning provides a roadmap for achieving your goals, whether it's buying a home, retiring comfortably, or leaving a legacy.

In India, SEBI Registered Investment Advisors (RIA) can provide financial planning and investment advisory services

Fee-only advisors charge you directly for their guidance. As a SEBI RIA, there are no commission based target sales, and hence you get advice on what is needed as per your specific needs and life goals.

Transparent fees ensure you know exactly what you're paying for. Plus, you avoid hidden commissions in investments that could erode your returns over time.

PLANNING PROCESS

1 Personalized Risk Assessment

We start by understanding your unique goals and risk tolerance.

2 Agreement & Collaboration

We formalize our partnership with a clear agreement outlining our services.

3 Deep Dive into Your Finances

Together, we'll thoroughly review your income, expenses, assets and liabilities.

4 Your Financial Blueprint

Within a month, you'll receive a customized roadmap designed to achieve your long-term vision.

SERVICES AND OFFERINGS

Standard Offering

Income & Expense Analysis
Gain clarity on your spending habits, optimize your budget, and reach your financial goals faster

Children's Education
Ensure your child's academic dreams are fulfilled with a personalized savings plan.

Children's Marriage
Celebrate your child's wedding without financial stress. Invest early to meet their future wedding expenses

Health Insurance
Choose the right health insurance plan for you and your family. Get personalized guidance for optimal coverage.

Life Insurance
Secure your loved ones' future with the right life insurance plan. Protect what matters most.

Retirement Planning
Design a retirement plan that ensures comfort, security, and the freedom to enjoy your golden years.

Real Estate
Unlock your real estate potential and build wealth. Determine the optimum exposure to real estate.

Liability (Loan) Analysis
Identify opportunities to reduce debt and save money. Optimize your loan strategy for greater financial freedom.

Will & Family Succession
Protect your legacy and ensure a smooth transition. Seek expert guidance for a clear will and succession plan.

Portfolio Restructuring
Reduce risk and boost your portfolio's resilience. Strategically restructure your investments for long-term stability.

Tax Planning
Reduce your tax burden and discover eligible deductions to optimize tax savings.

Gold & Commodity
Diversify your portfolio and protect your wealth against inflation with gold and commodities.

Premium Offering

On Demand Services
Save time and reduce stress with on-demand services. Get what you need, when you need it.

Active Investment Management
Benefit from expert analysis and market insights. Active fund management leverages professional knowledge for your portfolio.

Startup Investment
Become a part of the future. Invest in startups and contribute to economic development

Multiple Insurance Evaluation
Review your existing policies to eliminate unnecessary coverage and ensure optimal protection

Business Consulting
Enhance profitability, streamline operations, and unlock your business potential with tailored consulting solutions for financial health and strategic growth.

Global Investments
Access worldwide growth potential. Diversify your portfolio with expert guidance in global investments.

ADVISORY PLANS

	FINANCIAL ROADMAP	360° Financial Navigator
	Our one-time financial advisory plan addresses common goals like family savings, retirement, and children's education. We'll create a personalized roadmap, tailoring your existing and future investments to match your unique needs and objectives.	Elevate your wealth management with our premium, yearly contract. Experience exclusive startup investment opportunities, active fund monitoring, personalized investment and insurance guidance, plus on-demand financial services for maximum convenience and growth.
Fees	Rs 8000	Rs 96,000
Contract Validity	1 Month	12 Months
Recurring Meeting Fees	Rs 2500 Per Meeting (1 hour)	NIL
Services	Standard	Standard + Premium
Best Suited For	Networth upto ₹50L	Networth > ₹50L
Insurance Policy Evaluation	Max 3	Any number

"Let's craft a financial roadmap that's as unique as you are."

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