

JITENDRA PS SOLANKI ADVISORY
SEBI RIA- INA100000184

Financial Planning- First Year

This is the first year of engagement with all our clients where we create a detailed financial plan. The process starts with a complimentary meeting where we discuss the details and scope of the project. Once engagement is signed, we go through the fact finding process where we collect all the information required for preparing the financial plan. When the plan is prepared, it is discussed and an action plan is given to you.

The fee for first year of the engagement ranges from **Rs. 20000 to Rs. 60000**. The actual fee we quote you once we understand your requirement and the scope of work involved.

Financial Planning and Investment Management - Second Year Onwards

A financial plan gives you a road map for your future. But financial situations are not static. There are change in circumstances due to change in family needs, health issues, financial issues and many other. In such instance you have to bring a change in your planning strategies. This cannot be achieved unless your financial plan is dynamic. This makes financial planning an ongoing process where regular reviews should be done to accommodate all such changes.

So if you want not only the one-time financial plan delivered to you but ongoing guidance i.e. help with implementation, monitoring and ongoing education to ensure you stay on track, it is available through our Ongoing Financial Planning Services.

We will provide you with following services under Ongoing Financial Planning Services Agreements:

- Periodic meetings to assess the progress of the plan
- Annual review of financial plan analysing changes happened during the year and accommodating in the plan
- Support through email to address additional queries or financial issues.
- Ongoing Training & Education to enhance your awareness on matters related to managing personal finance

Our Investment Management services include:

- Risk assessment and devising investment strategies which is in line with your financial objectives.
- Periodic performance report and Review
- Rebalancing of investment portfolios as and when necessary
- Yearly Review of Investment Strategy
- Yearly review on matters related to taxation of your investments and other aspects

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The fee from second year onwards is based on the scope of work involved as structured below -

For Financial Planning and Investment Management

Fee Basis	Rs. Per Annum
• For AUA (Assets Under Advice) below Rs. 30 lakhs	22000
• For AUA Rs 30 lakhs to Rs 200 lakhs -	.75% of AUA
• For AUA Rs 200 lakhs to Rs 500 lakhs-	.60% of AUA
• For AUA above Rs 500 lakhs - .	.40% of AUA

**The above-quoted fees are exclusive of any taxes that may apply*

- **Continuous Planning**

The larger benefit of our financial planning services is that it ensures throughout the year your financial situation receives needed attention which is required. Whether you are starting your career or in the middle of it or may be a retiree, our services are designed to meet your specific requirement. Above all, the ongoing financial training & education helps you in enhancing your awareness on various financial matters which leads you to take control of your financial decisions.