

# JITENDRA PS SOLANKI ADVISORY

SEBI RIA- INA100000184

We are a fee-only financial planner and so we serve all our clients in a fiduciary capacity. This ensures we are acting in the best interest of our clients.

Our source of compensation is only the fee we charge to our clients. There is no commission involved of any kind in our services. Hence we are more of a partner to our clients who work with them to ensure the financial decisions our clients make are sound and help them achieve their life goals.

Our fee structure is very transparent. We do not have any hidden cost and our fees revolve around Life Plan System we have designed for you. The sole objective of our services is meeting our client's requirements.

Give below is our fee schedule for our [Life Plan System](#):

## PSN Life Plan System- For First 12 Months

PSN Life Plan System		
	Scope	Value (R)
Life Care Plan	Understanding Your Preparedness	8000
	Your Vision Document	
	Creating Time Line for Child Life Stages	
Transition Plan	Understanding Transition Stages	5000
	Identifying Transition Phases In Your Life Plan	
	Action Plan for Each Transition Phase	
Benefit Plan	Identifying Resources for Child	4000
	Government Benefit Plan	
	Gift/Inheritance	
Communciation Plan	Communicating Your Vision	3000
	Letter of Intent	
<b>Total Value of Above 4 Elements</b>		<b>20000</b>
Special Needs Financial Plan	Holistic Financial Plan	25000
	A Detailed Plan Identifying Your Financial Requirements	
Legal Plan	Estate Plan Advisory	15000
	Cover Only Advisory on Will, Trust, Legal Guardianship and any other legal issues to be addressed.	
<b>Total Value of Financial &amp; Legal Plan</b>		<b>40000</b>
<b>Total Value of PSN Life Plan System</b>		<b>60000</b>

\* The fixed fee quoted as above are excluding taxes

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*\*\* The fee is payable in 2 instalments at interval of 6 months*

*\*\*We have preferred rates for Single Parents with special needs child to care and groups*

*\*\*\*Financial planning services quoted above are offered by Mr. Jitendra P S Solanki who is a Sebi Registered Investment Adviser under Individual category (Reg. No. INA100000184).*

## Services Under [PSN Life Plan System](#)

- ✚ Consultation with Experts on child assessment for various services
- ✚ Guidance & Assistance to the family on various processes required for child care- Legal Guardianship, Disability Certificate, Unique Disability Card and Others
- ✚ Guidance and Support in identifying appropriate residential living for the child (Presently in Delhi/NCR. For other cities we will work on case basis)

***Our Value Offer!!***

***PSN Life Plan System!***

***Sign up before March 31, 2022  
and avail a 20% off on our first  
year fee***

## PSN Life Plan System – After First 12 Months

We have a periodic review system based on the support delivered for various elements covered under Life Plan System. We will discuss in the first year and help you understand the review process under Life Plan System. Based on services still needed for 4 elements we will determine the fee which will be fixed in nature.

## For Financial Planning and Investment Management

The fee for financial planning and investment management will be either Retainer Based or based on Assets Under Advice. The fee will be quoted in the first year of the engagement.

All our fees are payable Monthly, Quarterly or Half Yearly.

### 1. Financial Planning

Whether you are in 20s, 40s, or retired, If you manage your assets and need only financial planning advice we work on a very reasonable fee with you. **We will charge a fixed fee of Rs. 15000 annually**

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and you receive continuous advice on your finances through periodic reviews. Our aim is to ensure your financial objectives remain align with your special needs child requirements.

## 2. Financial Planning and Investment Management

You may be just starting your investment journey or have accumulated assets. Investment management is a complex world. You need a fiduciary advisor to guide you not only in selecting the right investments but managing it to ensure it remains aligned with your financial objectives. We have services based on your life situations.

## 3. Starting Your Investment Journey

Whatever life stage you are if you haven't started investing and planning for accumulating assets we help you in your journey. From second year onwards we manage your finances which includes your investments and guide you in planning for your life goals. Here we charge a **monthly retainer of Rs. 2500** till you accumulate assets of Rs. 50 lakh.





### You Have Accumulated Assets

If you have accumulated assets of Rs. 50 lakhs and more than the fee for both Financial Planning and Investment Management is as below:

Rs. 5000 per month till your accumulated assets reaches Rs 2.0 cr

% of Assets Under Advice once your assets size is more than Rs 2.0 cr

#### Services:

-  Periodic Review of Financial Plans
-  Periodic reviews of Investments (If opted for asset monitoring)
-  Periodic reviews of other elements as decided
-  Full service support on all the elements of PSN Life Plan System

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Give below is our fee schedule for our [Foundational](#) Planning System:

## Foundational Planning System – For First 12 Months

The fee for foundational planning system in the first year is as below:

Resident Indian– Rs. 25000

Non- Resident Indian – Rs. 40000

*\*All quoted fees are exclusive of Taxes and payable in 2 instalments at an interval of 6 months*

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### What is covered in Services –

- ✓ *Financial Plans – Special Needs Member and Other Family Members*
- ✓ *Investment Recommendations*
- ✓ *Insurance Recommendations*
- ✓ *Risk Profiling*
- ✓ *Existing Insurance and Investments Analysis*
- ✓ *All Goals Analysis – Cost and Funding (Including Special Needs Child)*
- ✓ *Tax Planning*
- ✓ *Implementation Support (Within Scope of Engagement)*
- ✓ *Action Plan*
- ✓ *Estate Planning Objectives*
- ✓ *Support*
- ✓ *Written Report*

Note:

The client would receive Guidance & Assistance on various processes required for Special Needs Child care within this one year

All fees are subject to revisions every 3 years

*# We work on a Virtual Model also so we can help families across the globe on Special Needs Planning*

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## Foundational Planning System- After first 12 Months

From Second year onwards the client may sign up for our Retainer services. Here we do periodic reviews of the financial plan. Asset Monitoring is included in this service if opted. The fee will be quoted in the first year of the engagement.

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#### 4. You Have Accumulated Assets

If you have accumulated assets of Rs. 50 lakhs and above then the fee for both Financial Planning and Investment Management is as below:

- Monthly Retainer of Rs. 5000 till your accumulated assets reaches Rs 2.0 cr
- % of Assets Under Advice once your assets size is more than Rs 2.0 cr

### Services

- 🚦 Half yearly reviews of Financial Plan and Investments
- 🚦 Annual review of financial plan
- 🚦 Assessing need on estate plan documents reviews
- 🚦 Other elements are not covered in this service
- 🚦 All fees quoted above are subject to review every 3 years.

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Fee for any other services you can check out services section. Areas where we do not have expertise or we may have to involve other experts, fees will be quoted as per the scope of work involved.