



1st meeting - Introductory session: The goal with this meeting is to get to know you, your situation, and what you're looking for in a financial planning relationship. I will explain then how I work with my clients so you can have a clarity at the end of this meeting if I am the right financial advisor for you.

Engagement letter signing, KYC, and fee payment: Signing of investment advisory agreement by client & adviser, submission of KYC details and documents (PAN Card & Aadhaar Card/Any ID proof) by client as prescribed by SEBI for my records and then the fee payment by the client.

2nd meeting - Organizing data & knowledge sharing: Organizing and collecting financial data, figuring out your life goals, & discussion on the input data to have a better understanding your financial situation, your knowledge about investing and family circumstances.

3rd meeting - Financial plan presentation & knowledge sharing: Finalizing the plan with your feedback and presentation of the final PDF copy of the mutually agreed plan.

4th meeting - Preparation of action plan, support & Review: Clearing doubts, queries about the plan, preparing action plan for execution (Google sheet). Supporting you in the execution of the plan, monitor & review the plan in the engagement period.

Knowledge sharing will be on the following topics: Personal finance, Mutual funds, Risk management, Portfolio construction, investment strategy, asset allocation, portfolio rebalancing, equity market history, requisite temperament for equity investing, etc.,