



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 . 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.

Preparation of action plan, support & Review on need basis: Clearing doubts & queries about the plan, preparing the action plan for execution of the financial plan.

Supporting you in the execution of the plan & review the plan on need basis 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.,