

# The Financial Pulse



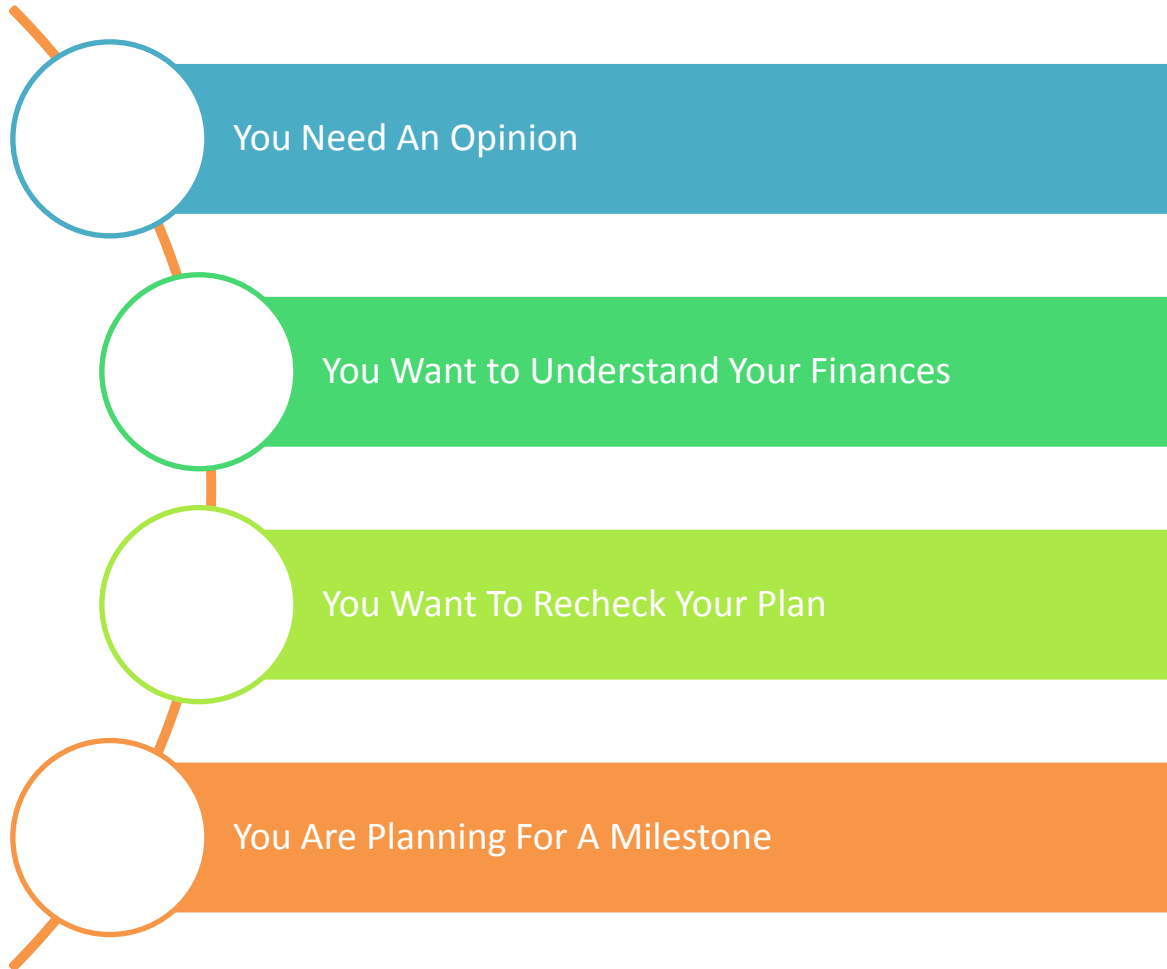
**A Financial Health Check Up Programme**

## Ask Yourself



Your Financial Planning is incomplete if any of its aspect is left behind. Ask yourself whether you have addressed all of them or you left few for later years. Even if you addressed how long since you reviewed them.

## Why Financial Pulse?



If you have any of the above requirement or concern, **The Financial Pulse** is for you. This programme helps you in analyzing your finances and identifies areas where you need improvement. When you know issues in your personal finance you can take appropriate measures to improve them. The biggest advantage of a financial pulse is that in whatever situation you are it helps you in understanding more about your finances.

## What Is Covered In The Financial Pulse?

Content	Covered
<b>Analysis of Current Situation</b>	Detailed
<b>Cash Flow Planning</b>	Annual
<b>Net Worth Planning</b>	Detailed
<b>Emergency Funds Planning</b>	Detailed
<b>Debt/Loan Management</b>	Summary
<b>All Goals</b>	Summary
<b>All Goal Funding</b>	Summary
<b>Life Insurance Planning</b>	Detailed
<b>Health &amp; Other Insurance Planning</b>	Detailed
<b>Retirement Planning</b>	Summary
<b>Risk Assessment</b>	Investments
<b>Investment Planning</b>	Summary
<b>Tax Planning</b>	Summary
<b>Estate Planning</b>	Summary
<b>Existing Investment Review</b>	Detailed
<b>Existing Insurance Policy review</b>	Detailed
<b>Implementation Schedule</b>	With Product Recommendations
<b>To Do Action Plan</b>	1 year
<b>EMAIL ASSISTANCE</b>	12 months

## How We Do It?

### The First Meeting

This is a session where you get to know more about us and our services. On other side it gives an opportunity to us to know more about you and your existing lifestyle, your outlook towards your retirement, your area of concerns and an understanding on your goals, values, attitudes and objectives which matter to you most. Once we have discussed and you decide to hire us, i.e. we both decide to work with each other, we initiate the engagement process. A written engagement letter will be proposed to you which details the scope and cost of our services. Once you have accepted the proposal by signing it, the quoted fee will become payable at this stage. On acceptance of the proposal and payment of the required fees, the fact finding process gets started.



### The Fact Finding

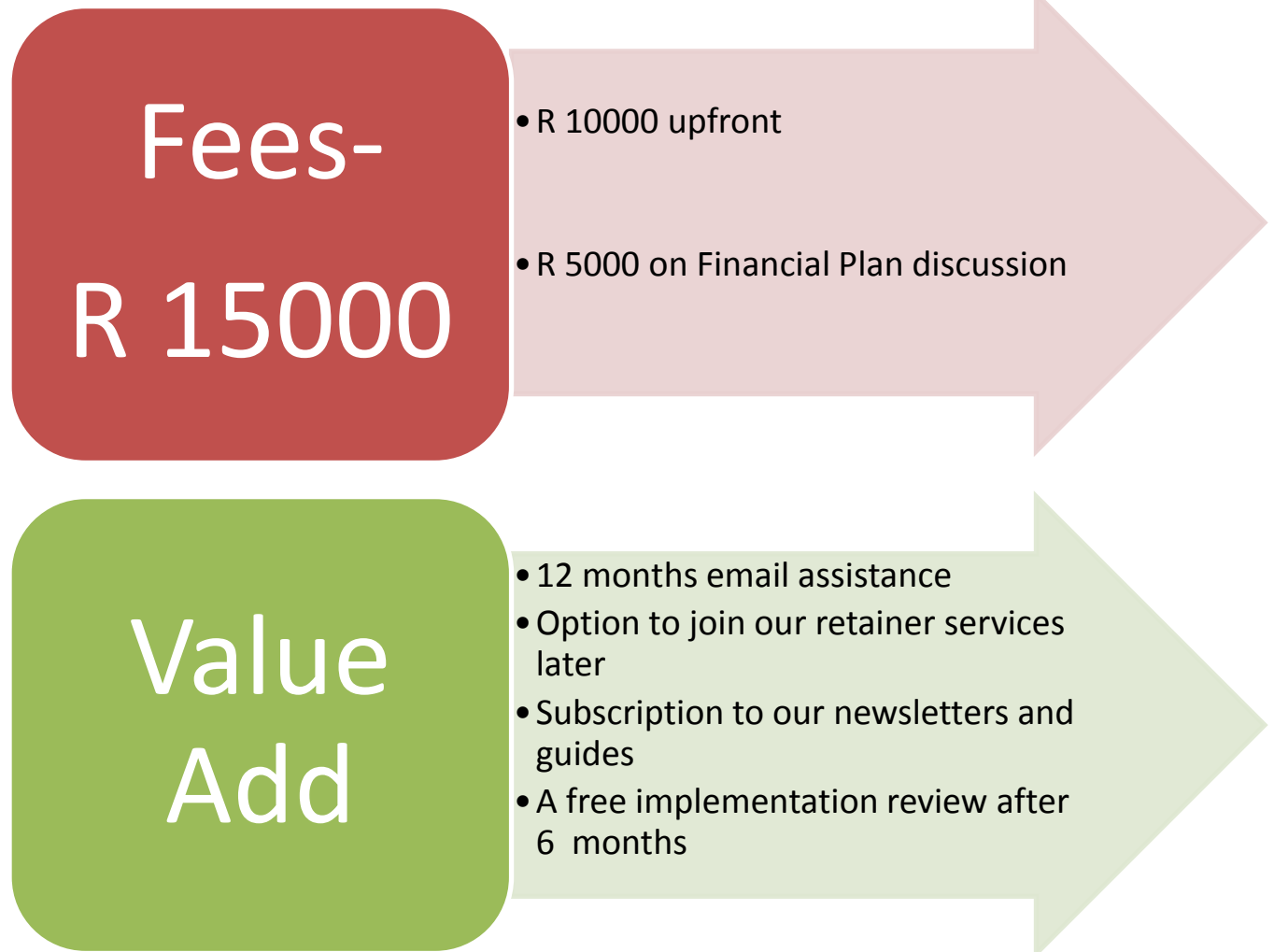
During and after the first meeting, we will seek all the information which we require to analyze your financials. A detailed personally tailored questionnaire is sent to you, well in advance, to collect the information. This becomes the foundation of our analysis. You may also be asked to fill out other questionnaires related to your life to help us learn in-depth of what's really important to you



### The Second Meeting

During this meeting we review your financial health which has been created on the basis of information provided by you. Along with numbers, you also receive our recommendation as to what path you should take which will be in your best interest. At the end of the session you will be delivered the strategic report on your financial health. Post this meeting you will get email assistance and a complimentary review session during the mid-term of our engagement.

## Our Fees And Value Add



The financial health checkup programme delivers you benefits more than what you have sought. With 12 months assistance and a free review of action plan after 6 months we ensure you have not only laid down your financial roadmap but also brought in into action.

## **Schedule Your Appointment**

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