

An ISO 9001 Conglomerate

We offer Four packages:

- 1. GOLD**
- 2. PLATINUM (INDIAN RESIDENTS & NRI)**
- 3. CORPORATE (TRUST, COMPANY & HUF)**
- 4. FAMILY PACKAGE (INDIAN RESIDENTS & NRI)**

1. Gold Package @ ~~15,000~~10,999 INR (Inclusive of GST)

Services Offered:

- a) Financial Health Check
- b) Detailed Personalised Project Report

2. Platinum Package For Indian Residents @ ~~25,000~~19,999 INR (Inclusive of GST)

Services Offered:

- a) Includes Gold Package
- b) Consultation on Goal based financial planning & Investments
Service Provided:
 - Personal / Corporate Goal Achievement Programme
 - Detailed Income & Expense Analysis
 - Cash Flow Management
 - Current Financial Resources
 - Debt Management
 - Goal Funding Analysis
 - Life Insurance Analysis
 - Risk Profiling
 - Asset Allocation
 - Opinion on Structured Investments
 - Action Plan
- c) Customised **Asset Allocation**
- d) **Implementation of advise** in specific investment which will be customized as per the goals & objectives
- e) **Online Transaction Platform.**
 - Transact Online (No Paperwork required)
 - Track Your Investments Updated Real time (Stocks, Mutual Funds, Bonds, Insurance, PPF, Fixed Deposits, Metals etc)
 - **Track Your Family's Portfolio** along with Your all together

- Track Your Short & long Term Capital Gains Tax for the Current Year or Previous 10 years
- Set Alerts to remind you on policy renewals for Life, Health, Motor, Sips, Maturity, etc

f) **KYC – Know Your Customer Registration with SEBI** (Securities & Exchange Board of India),

Service Provided:

- Registration
- Processing
- Approval
- Resolving any queries from Government authority etc
- Guidance to update your ADHAAR

Activating KYC enables us to open new accounts with all SEBI registered intermediaries such as:

Mutual Funds
Depository Participants
Stock Brokers
Portfolio Managers Venture
Capital Funds Collective
Investment Schemes

Also eliminates the need to repeat standard KYC verification in future.

g) Creation of **NSE (National Stock Exchange) / BSE (Bombay Stock Exchange)**
Account for online transactions,

Service Provided:

- For Creating online Account
- Documentation
- Handing Over Documents or any other leg work
- Resolving Discrepancies (if any)
- Getting Approval etc

h) **Wealth Munshi APP** to track , plan & transact!

i) Post implementation **Service Support** (if any)

j) **Review** of Portfolio / Investments once a year!

k) Whats app Tutorial Subscription for a Year! (Please send a request to: +91-93979-98765)

l) Dedicated RM (Relationship Manager)

Platinum Package for Non Resident Indian (NRI) INTRODUCTORY OFFER
@ ~~35,000~~ 24,999 INR only (Inclusive of GST)

Services Offered:

- a) This would include all platinum services
- b) NRI / NRE ACCOUNT OPENING & ACTIVATION on Sanghi Platform / KYC / NSE etc
- c) Registration for FATCA (Foreign Account Tax Compliance Act)

3. Corporate Package (TRUST, COMPANY & HUF) @ ~~50,000~~ 34,999 INR (Inclusive of GST)

Services Offered:

- a) This would include all platinum services
- b) Corporate / HUF ACCOUNT OPENING & ACTIVATION on Sanghi Platform / KYC / NSE etc
- c) UBO Processing (Ultimate Beneficial Owner)

4. Family Package 2-4 Members (Indian Residents) @ ~~50,000~~ 29,999 INR
Family Package 2-4 Members (NRI) @ ~~70,000~~ 41,999 INR

This would include all platinum services

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