Online Payment

Account Name : Vansh Capital Pvt Ltd

Name of Bank : ICICI Bank, Bhandarkar Road Pune - 04

Account No : VANSHC

IFSC Code : ICIC0000106

SEBI Verified UPI ID :
(vanshcapital.ia@validicici)

vanshcapital.ia@validicici

Invest in your dreams. Plan for your goals. Financial peace of mind starts with a plan. Taking charge of your financial journey !

Financial Planning Service Fees

1 Year Fees Rs 33,000

(Inclusive of GST)

1st Year : 4 Quarter fees in advance
2nd Year : 2 Quarter fees in advance

We take no charge for the Introductory Meeting to fully explain how our Financial Planning Service works.

Mr. Rahul Jaju

Director - Vansh Capital Pvt.Ltd
SEBI Registered Portfolio Manager
NISM - PGP Portfolio Management
NISM - Certified Research Analyst
FPSB - Certified Financial Planner
Stock Market Profession Experience - 17 Years

Why Choose Us ?

- Comprehensive Services - From investment planning to retirement strategies and tax planning, we cover every aspect of your financial life.
- Enhanced financial planning through personalized one-on-one meetings.
- Our team of financial experts will guide you through asset allocation strategies.
- Our investment advice is tailored to your lifestyle and personal preferences.
- Review of your financial plan every three months.

This Investment Advisory Service brochure is prepared by SEBI Registered Investment Advisor Vansh Capital Pvt Ltd (INA000014818).This information brochure is mainly prepared for informational purposes to our prospective clients. All information presented in this brochure is sourced from reliable and reputable sources. However, we cannot guarantee the absolute accuracy of this information. Registration granted by SEBI, enlistment as IA with Exchange and certification from National Institute of Securities Markets (NISM) in no way guarantee performance of the intermediary or provide any assurance of returns to investors. Investments in securities market are subject to market risks. Read all the related documents carefully before investing.*Tax Planning, Insurance Planning, Retirement Planning, Commodity & Real Estate are not under the purview of SEBI, and hence no recourse through SEBI is available to the investors for their grievances related to such products/services.

VANSH
We Make Investor !

Vansh Capital Pvt Ltd

SEBI Registered Investment Adviser
(**INA000014818**)
Registration : **21 July 2020 - Perpetual**
BSE IA Enlistment Number : **1461**

Financial Planning Service

Reg. Office - 795 Bhandarkar Road, Mini Apartment, Near Metropolis Lab,Deccan,Pune - 04.

Email Id - vanshcapitaladvisors@gmail.com

Web - www.vanshcapitaladvisors.in

Cont. No - 9075976318 | 8766803516

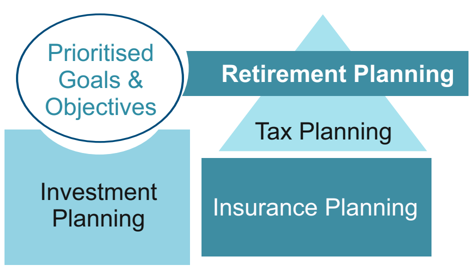
BASL Advertisement Approval Ref No : 11092023-1461-133

Financial Planning Service

Why Choose a Financial Planner ?

- **Goal Setting :** Financial Planner helps you set clear achievable financial goals based on your circumstances, risk tolerance and time horizon.
- **Research - Based Advice :** Financial Planner offers well-informed recommendation tailored to your financial situation, backed by extensive research and market analysis.
- **Periodic Rebalancing :** Financial Planner regularly reviews and adjust your portfolio to keep it aligned with your goals and risk tolerance.
- **Strategic and Tactical Asset Allocation :** Financial Planner uses a mix of long - term planning and short - term adjustments to enhance portfolio performance while managing risk.
- **Risk Management :** Financial Planner assess your risk tolerance and ensures your investment strategy matches it, preventing impulsive decisions.

Financial Planning offering



Goal Planning

Empowering Your Financial Success By Guiding You Towards Your Goals !

Goal Planning is an effective approach to achieve various financial objectives. This method allows individuals or households to tailor their financial decisions and investments to align with their unique goals, time lines, and risk tolerances. Here's how goal planning can be applied to each of the following goals.

- **Home:** Secure your dream home through strategic financial planning.
- **Car :** Drive towards owning your desired car with a well - structured savings and investment strategy.
- **Education :** Invest in your future by planning for your children's education and ensuring their academic success.
- **Wealth Creation :** Build a robust portfolio to grow your wealth and achieve financial freedom for the future.
- **Lifestyle Improvement :** Design a personalized financial plan to enhance your lifestyle and accomplish your life goals.

Investment Planning

Your Future, Our Expert Advise for Investing !

Investment Planning is about choosing the most appropriate investment solutions, understanding the risks, making the best use of tax allowances, and achieving a true level of diversification. Our multi-asset investment planning services are designed to help you achieve your financial goals while managing risk effectively. Whether you're a seasoned investor or just starting, our expert advisers will tailor a personalized strategy to grow and protect your wealth. Our multi-asset approach offers advice on Equity, Mutual Funds Debt Funds, REIT, Bullion, etc.

Tax Planning*

Unlock Tax-Saving Strategies Today !

Discover how our expert financial planning advice can help you minimize taxes, maximize deductions, and optimize your overall financial picture. By strategically managing your taxes, we ensure that you retain more of your income and assets while staying compliant with the latest tax laws. Secure your financial future with our efficient and reliable tax planning services.

Insurance Planning*

Protecting what Matters Most with Smart Insurance Choices !

Life is full of uncertainties, but with the right insurance coverage, you can shield yourself and your loved ones from potential financial hardships. Our mission is to empower you with the knowledge and advice needed to make informed insurance decisions ensuring your peace of mind and financial well-being.

Retirement Planning*

Your Journey to a Worry - Free Retirement Starts Here !

Are you prepared for your retirement ? How much money will be enough for you to live comfortably ? Retirement planning is about taking charge of your financial future by looking ahead. It's making sure you'll have enough money to meet your needs during retirement. If you're already retire, we'll help you make the most of your savings and pensions while minimizing taxes. We'll also check if your current income is enough to support your lifestyle in the long term. Let us guide you towards a worry - free retirement with smart and responsible financial planning.