

All Services At a Glance

- **Investments** : Mutual Funds, other products.
- **Insurance** : Term, Health, Others.
- **New Loan / Balance Transfer** : Home, Business, LAP, Others
- **Bonds**: Capital Gains, GOI, Company FDs, NCDs
- **Old Investments Retrieval** : Shares, Provident Fund.
- **Global Investment & Immigration consultancy**
- **Financial Workshops**



Rajesh Minocha

Certified Financial Planner (CFP)

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Mutual Funds

- Suitability assessment through detailed conversation
- Mutual funds recommendation & implementation
- Online platform with minimal documentation
- Portfolio tracking and key reports through provided App & Website
- NRI investments also done
- If not KYC compliant, support provided through an online platform



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Insurance

- Assessment of how much and tenure
- Provide term insurance, online document submission
- For NRIs also, without needing India presence, through tele medicals, for select countries. Valid globally
- Health insurance, General insurance



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Debt Management

- New loans, balance transfer @ attractive interest rates
- Home loan, Loan Against Property, Vehicle loan, Personal loan, Jewellery loan
- Loan against shares
- MSME loans, Business loans
- Lease Rental Discounting (LRD)
- Travel card, Credit cards, Remittances, Forex cards



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Financial Workshops

- Personal finance educational sessions
- In-person sessions or Webinars
- Corporates, Educational institutions, housing societies



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Old Investments Retrieval

Our team of researchers like solving puzzles



Share Samadhan

- Do you know if your family member (s) has any old or forgotten investments ???
- Do you have any CLUE ???



We might find the missing piece for you

For more details
Call or Message



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Old Investments Retrieval

Setup in 2011. Have already recovered/in process of financial assets more than Rs.100crores 50-member professionals' team - niche experience in unclaimed investments

Recover Your Money / Investment

- Old Shares / lost shares / physical shares to demat
- Unclaimed dividend / mutual funds / insurance / provident fund / bank deposit
- Real estate recovery
- Loans givens to parties
- Transmission in case of death
- Debtor Recovery
- Tax refunds

Assistance if large amount of money is blocked.



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Global Investing



Residency & Citizenship by Investment



Global Stock Market & Related Products



Global Real Estate



Global Business Set Up

Associated with a leading consulting law firm working with more than 20 countries.



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