

Financial Planning Solutions- Overview, Pricing & Features (W.e.f. 1st April 2018)

Features	Single Goal based Plan	Basic Financial Planning Solution	Comprehensive Financial Planning Solution
<i>Data Collection</i>	Only Basic data	Detailed Financial data	Complete Financial data
<i>Financial Plan Writing</i>	No	Yes	Yes
<i>Recommendation & Action Plan</i>	Yes	Yes	Yes
<i>Emergency & Risk Planning</i>	Yes	Yes	Yes
<i>Retirement Planning</i>	No	Yes	Yes
<i>Additional No. of Financial Goals</i>	Any 1 of the Goals from below : <ul style="list-style-type: none"> ▪ Car/Home purchase. ▪ Marriage/Higher Education. ▪ Vacation. 	Any 2 of the Basic Goals from below : <ul style="list-style-type: none"> ▪ Children's Higher Education/Marriage. ▪ Capital for Business Startup. ▪ Car/Home Purchase. ▪ Vacation. 	Any 5 including aspirational ones such as : <ul style="list-style-type: none"> ▪ Children's Higher Education/ Marriage. ▪ International Vacation. ▪ Dream Car/Home Purchase. ▪ Capital for Business Startup. ▪ 2nd Home Purchase. ▪ Wealth Creation.
<i>Total No. of Goals Covered</i>	2	4	7
<i>Asset Allocation Plan</i>	No	No	Yes
<i>FREE Online Transaction Platform</i>	Yes	Yes	Yes
<i>Tax Optimization</i>	Yes	Yes	Yes with Tax Planning
<i>Monthly Performance Reports</i>	Yes	Yes	Yes
<i>Portfolio Review Frequency</i>	Yearly	Half - Yearly	Quarterly
<i>Existing Portfolio Review along with Goal-Linkage</i>	No	No	Yes
<i>Restriction on Investment Size</i>	Rs. 20 k p.m / 10 L Lump sum	Nil	Nil
<i>Free* De-Mat & Trading A/C</i>	No	Yes	Yes
<i>Face to Face Meetings with Financial Planner</i>	1	2	4
<i>Wealth Management Service</i>	No	No	Yes with Min. Portfolio size: Rs. 5 Lakhs
<i>First Year Fees (+ 18% GST)</i>	Rs. 5,000/-	Rs. 17,500/-	Rs. 30,000/-
<i>Renewal Fees (+18% GST)</i>	Rs. 1,000/-	Rs. 10,000/-	Rs. 17,500/-

Note: *De-Mat / Trading A/C Opening & Administrative Charges for the first year is Nil but the Annual Maintenance & Mandatory DP charges will be applicable. The Min amount for starting the De-Mat & Trading A/C is Rs. 50,000/-.