

## Golden Years Financial Planning Solution- Overview, Pricing & Features

Features	Golden Years Financial Planning Solution	Golden Years Online Financial Planning Solution
<i>Data Collection</i>	Detailed Financial Data	Detailed Financial Data
<i>Recommendation &amp; Action Plan</i>	Yes	Yes
<i>Execution Of Plan</i>	Yes	Yes
<i>Emergency &amp; Risk Planning</i>	Yes	Yes
<i>Regular Income Planning</i>	Yes	Yes
<i>Additional No. Of Financial Goals</i>	Any 2 of the Goals from below: ❖ Children's Higher Education/ Marriage ❖ Charity/Philanthropy ❖ Gift for Grand Children. ❖ Hobbies/Vacation.	Any 2 of the Goals from below: ❖ Children's Higher Education/ Marriage ❖ Charity/Philanthropy ❖ Gift for Grand Children. ❖ Hobbies/Vacation.
<i>Total No. of Goals Covered</i>	4	4
<i>Asset Allocation Plan</i>	No	No
<i>Tax Optimization</i>	Yes	Yes
<i>Existing Portfolio review along with Goal-Linkage</i>	Yes	Yes
<i>Restriction on investment Size</i>	NIL	NIL
<i>Free Online Transaction Platform</i>	Yes	Yes
<i>Access to Financial Planner</i>	Initially 2 times face to face and then ongoing via Phone/Whatsapp/Mail	First Time as well as ongoing via Phone/Whatsapp/Mail.
<i>Monthly Performance Reports</i>	Yes	Yes
<i>Portfolio Review Frequency</i>	Half-Yearly Face to Face	Half Yearly via Phone/Video chat
<i>First Year Fees (+18%GST)</i>	Rs. 12,000/-	Rs. 6,000/-
<i>Renewal Fees(+18%GST)</i>	Rs. 4,000/-	Rs. 2,000/-