



## Eleganz Financial Management & Insurance Marketing Private Limited

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## **Greetings From Eleganz Financial Lucknow U.P. India.**

### **ABOUT:**

ELEGANZ FIANACIAL is a India's leader in financial planning. It has pioneered the financial planning process years ago. Its unique dream > Plan> Action approach is about more than just numbers, it's both science and art. It has many financial planning more **CERTIFIED FINANCIAL PLANNING** specialist/CA and professionals and is a trusted Financial Services Advisor.

### **WHY ELEGANZ:**

At Eleganz, we believe that every dream-and the person who dreams it-is special. Throughout our history , we've been putting the needs of our clients first. That's an approach each one of our Advisors believes in. While our Financial Advisor's know a lot about finances, they don't know a lot about you , atleast initially. We take the time to listen to you and understand your dreams and goals , because our , mission is to help you reach your goal.

The history of serving clients, strong capital base, broad capabilities, proven business model and experienced management team combined with our strong values-have helped us create a legacy.

### **HOW CAN WE HELP YOU?**

We help you realize your dreams & goals at Eleganz, we work with our clients towards achieving their dreams and goals through objectives and qualified financial advice, implement comprehensive range of customized financial solutions, and ensuring that the goals are achieved through a robust tracking mechanism which allows for course corrections in line with life events.

### **WHY DO YOU NEED FINANCIAL PLANNING?**

Effective financial planning can help you save, invest and protect what's important to you, make wise spending decisions now, and manage future goals even as they evolve.

**OUR OFFERING:**

We offer a full range of preconized financial advisory services that are focused on your needs and aspirations, and help you stay on the path towards achieving them. We've created three distinct offerings to help you choose how to best work with Eleganz.

With each of these offerings, you'll have the support of one of our highly trained Financial Advisors and experts, access to experienced and qualified investment specialist, and the reach to over 100 financial services firms to meet your needs and requirements.

**PRIMARY ACTIVITIES**

1. Investment Management
  - a. Mutual Fund
  - b. Fixed deposits..
  - c. Bonds and securities.
  - d. Company FDs.
2. Insurance management
  - a. General insurance.
  - b. Health insurance
  - c. Accident Insurance.
3. Post Office Saving Schemes
4. Retirement Management
5. Banking services-Loans/Deposites,etc.
6. National Pension Scheme.

**SECONDARY ACTIVITIES**

1. Income Tax Filing
2. Pan services.
3. Aadhar Servicing.
4. Driving License ( Assisted Training)
5. Fast Business centre

## **WHAT IS ELEGANZ POWER PRODUCT ADVISORY ?**

Are you looking for transparent and unbiased advice? Searching for a financial product that's best for you? In need of personalized financial advice to manage your investments? Eleganz powers offers specialized advice on financial products available through our alliance with more than 100 leading financial services companies in India.

## **ELEGANZ POWER ?**

Eleganz Power product advisory service helps you choose a specific financial instrument from a wide range of options available as a result of our tie-up with financial companies offering services in asset management, life and general protection, specialized financial products, banking & real estate.

Your financial Advisor will take the time to understand you and what you're looking for before offering you a solution. Your Advisor can help you take a look at your overall financial situation, risk tolerance, your goals and ideas and product recommendations after an exhaustive and unbiased research.

## **DO YOU HAVE CONCERNS ABOUT YOUR FINANCES?**

We Can Help You Find Answers.

- When can I afford to retire?
- How much money do I need to live comfortably?
- Will I run out of money in retirement?
- How much risk do I really need to take to achieve my goals?
- How can I protect my family?
- What are the best investment Options
- Sort-Term-Long term Investment
- Banking (Loans, Etc.) Solutions

## **ELEGANZ GOAL- BASED FINANCIAL PLANNING**

### **HOW DOES IT BENEFIT YOU?**

Eleganz Planning goal based financial planning service helps you to build a financial strategy around your goal. We understand that thinking about the future may lead to concern, confusion, and stress. Working closely with our with our clients, we find the right financial solutions to help our clients achieve confidence. We believe that wealth is about more than just your account balance. Money is a tool that allows you to achieve your dreams and live a comfortable, meaningful life. As advisors, our first goal is to help you understand and prioritize the opportunities money brings. To some, that opportunity represents an early retirement or the freedom to spend more time with the grandkids. To others, it's a once-in-a-lifetime vacation with the ones you love. Whatever that opportunity means to you, we'll help you uncover it and create financial strategies to pursue it. Your Financial Advisor will help you:

- a) Gain a clear understanding of the action steps required to achieve their goal.
- b) Determine the amount of money needed for achieving the goal, while taking into account the impact of inflation.
- c) Help you create a detailed financial plan and keep you on track even through life changing events.
- d) We will identify and purchase the right financial products keeping in mind your risk profile, and help you accumulate wealth, protect what's important, and even help with specialized services like real estate purchase & looking for best deals on loans.

### **HOW DOES IT WORK?**

We follow a disciplined Financial Planning Roadmap that explores your personal circumstances through in-depth conversations and develops a thorough picture of your financial life. Once we are confident that we understand your financial picture, we make recommendations and offer solutions. We then use your financial priorities, future goals, and attitude about risk to create a personalized roadmap that is designed to take you where you want to go in life. By examining your situation from investment, tax, insurance, and estate planning perspectives, we help you organize your finances and clearly understand your choices. We

make the complicated simple by explaining your options and Educating you without overwhelming you with information. Our work doesn't stop there. We will work closely with you to implement the strategies we create and offer ongoing communication so that you feel supported every step of the way. On a regular basis, we review your progress toward your objectives to help ensure you're staying on track. Most importantly, we offer a guiding hand and a reassuring voice on the phone whenever you have questions or concerns. We leverage industry leading technology to offer you constant access to your accounts and provide clear, concise information about your overall financial situation. Your financial Advisor will work closely with you to understand your dream.

- a) Together you will decide on the financial resources that would be needed to make the dream reality, and then put a timeframe for achieving that financial goal.
- b) We will draw up a financial plan to help you reach your milestone, and implement your plan by facilitating the purchase of relevant financial products, like mutual funds, protection plans, etc. and assist you on other services like real estate and loans.
- c) Your Advisor will help you track the progress through regular updates about your portfolio, and advise you on corrective measures should the need arise.

We're confident we can help you feel more confident about your financial future. Talk to a financial advisor today about how Eleganz Planning Goal-based financial planning can help you reach your dreams and financial goals.

### **DEDICATED TO SERVICE FRATERNITY**

The office(s) at Lucknow Cantonment will be manned initially by 50-60% of Ex-Serviceman/ their wards (after training) to provide employment opportunity to them. This will be enhanced to 80-90% if fully qualified persons are available. Since this is a one stop solution at your hand's reach with easy availability and preferred assistance, it works out to be a good solution to all your financial needs. This is solely for the benefit of armed personnel and dedicated in their well being and financial growth.

### **WE ARE A FAMILY**

We treat our clients like members of our extended family. We understand family dynamics and how financial decisions impact every aspect of your family's life. As a multigenerational family we are a family business, we care about every generation of your family. We are happy to work with your children and grandchildren to help ensure that they get the prudent advice they need to pursue their long-term financial goals.

### **YOUR QUALITY OF LIFE IS OUR MEASURE OF SUCCESS**

We don't chase performance or try to hit home runs with your life savings. Instead, we focus on deeply understanding your needs, setting reasonable objectives, and creating customized strategies that help you achieve your personal life goals in an ever-changing world. We follow a disciplined investment approach with an emphasis on risk management and tax efficiency to help you keep more of what you earn. By offering a holistic and integrated approach, we provide meaningful financial guidance that helps you make informed decisions.

### **WE ARE ALWAYS HERE TO HELP**

We Strive to be your trusted partner and as such we are always available to answer questions, clarify complicated correspondence or to simply listen to your financial concerns.

### **OUR SUPPORT IS LIFELONG**

We don't just offer you a roadmap to your financial goals; we walk with you along the journey and help you make the right choices every step of the way. We want to be involved in all of your family's important financial decisions.

**THANK YOU**