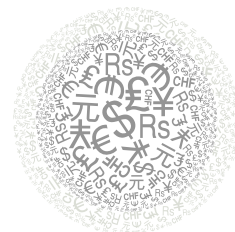


*Wealth Routes*  
Relationships built on faith



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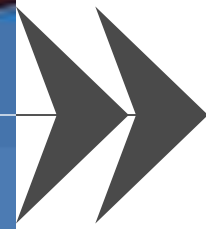


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# Identify

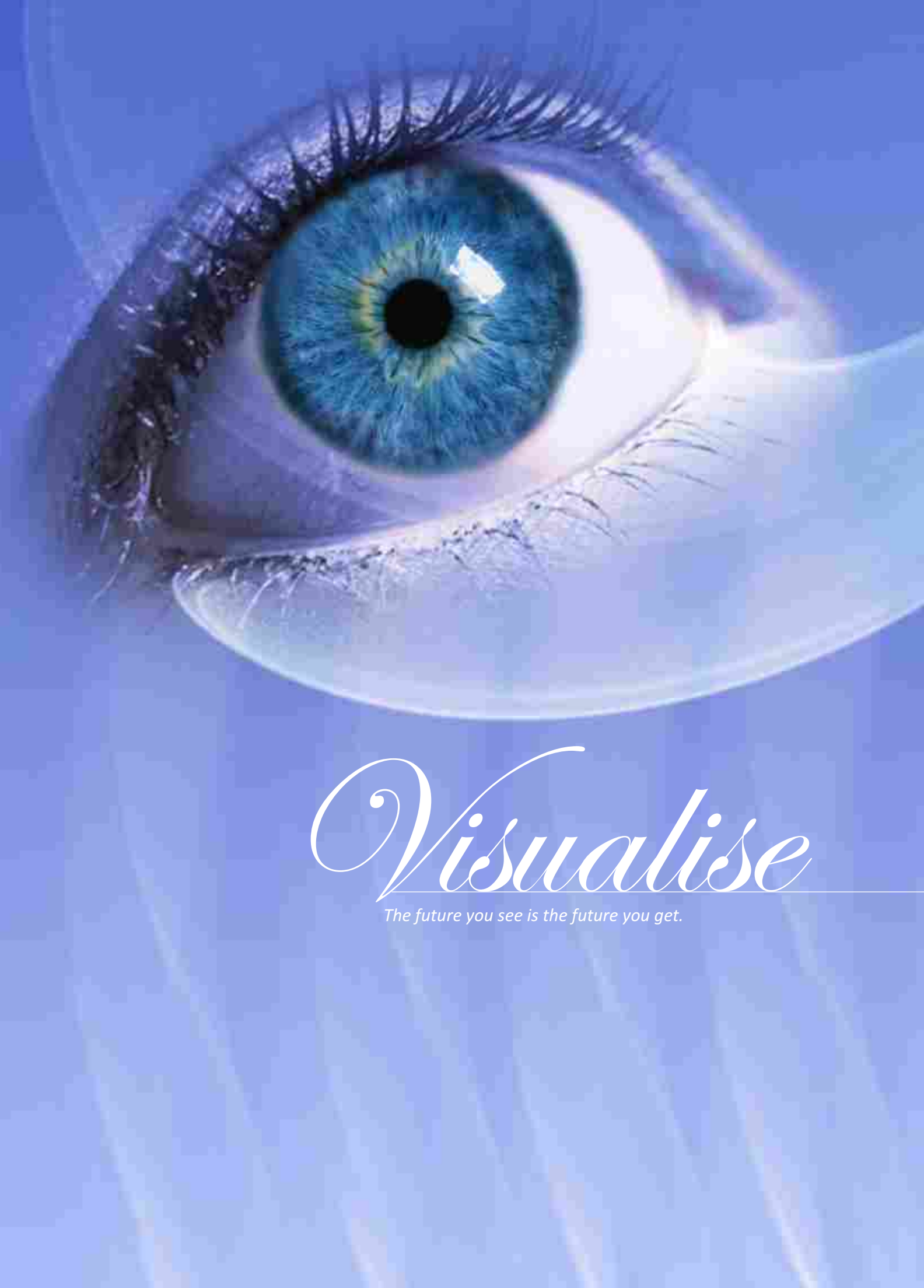
*Take the first step in faith.  
You don't have to see the whole staircase.  
Just take the first step.*



The very foundation of our business is faith. Faith embodies focus, assurance, integrity, trust and honesty.

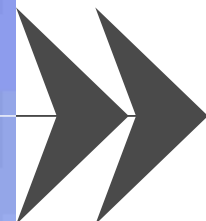
In a complex world where the financial services industry is subject to rapid change, the principles that define our business remain constant. We never compromise on our principles and that's what builds our clients' trust in us. We repay that trust by providing tailormade investment advice based on extensive global research. Our best reward is seeing you achieve your investment goals. In this process we never forget that you took that first step in faith.





# Visualise

*The future you see is the future you get.*



Market volatility is not a fearful event. Rather, it is an opportunity to patiently analyse, minutely understand and intelligently execute prudent investment decisions. With so many investment options, it is often confusing to see things in the right perspective. This is where we can help.

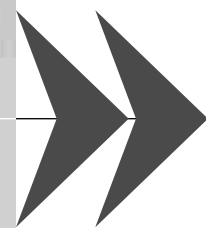
We have knowledge and experience in financial services that enable us to understand your specific needs and recommend the precise products that fit your risk profile. What's more, we believe that you should fully understand the risk factors before making any investment decisions. With our expertise, we can look beyond the immediate to make sure you have a secure future.





# Analyse

*Discovery consists of seeing what everybody has seen and thinking what nobody has thought.*



We offer a wide range of products and services. However, the products that are suitable for you can only be ascertained after careful consideration of your risk return profile and financial objectives. This way we help you set a clear and realistic path towards meeting your short-term and long-term goals.

Our products and services include:

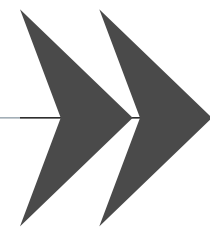
- Fixed income products like bonds, fixed deposits and debt mutual funds
- Top equity ideas from across all major international markets
- Structured products that include capital guaranteed and yield enhanced solutions
- Insurance
- Other financial solutions that match your risk profile

The investment options are shortlisted from the product suites of the leading private banking and asset management companies in the world. This way you get the best of the breed investment products from a single source.



# Differentiate

*Making good decisions is a crucial skill at every level.*



Choosing an investment advisor is one of the most important decisions of your life. After all, you have worked extremely hard to create this wealth and you should not let an important decision such as this one be taken without giving careful consideration to factors like organization culture, the sale process, the motivation behind product recommendations, and most importantly the person in the forefront - the advisor.

Here's why you should consider us instead of other financial advisors in the marketplace:

1. **We are a totally independent company.** This means that we are not driven by monthly targets, aggressive bosses and personal motives. We own this business which means we own the relationship. Credibility is our biggest strength. . We endeavor to offer our clients impartial advice and the best of breed investment products.
2. **Our ability to save you time and money** is driven by the fact that we understand this business very minutely. Having exposure to some of the most reputed multinationals globally, we know the dynamics of costs and revenues intrinsic to any product. This knowledge empowers us to negotiate the best deals for you.


3. **Totally transparent and ethical** in our business operations, we help you evaluate the risk return tradeoff in the most professional manner.
4. **Confidentiality** is one of the key drivers in any relationship. Unlike advisors who may reveal names and discuss client portfolios in public, we remain discreet about our clients and our relationships. Client information is religiously protected.
5. **Continuity** with the organization is guaranteed since we own the business. Unlike professionals who may shift to other organizations for various reasons, we are able to sustain a relationship with our clients.
6. **Service** is the most important reason why clients stay loyal to an organization. Our brand of service sets us apart . Quarterly reviews, online statements and frequent personal contact help our clients know where they stand with their financial goals and objectives

And finally,  
we stay committed to you not just as your advisor but as your most trusted friend.



# Establish

*Put not your trust in money but put your money in trust.*



For us, the singular focus is YOU. Your goals and aspirations become our mission.

We dedicate our time and resources to creating a strategy that is all about you and your future. We identify the best of breed investment products, conduct detailed due diligence, come up with innovative ideas and formulate a plan that is ideal for you. In doing so we ensure that we stay within the risk return parameters defined by you, delivering results and reviewing progress at periodic intervals.

Our commitment to ethical business practices and our belief in our core values ensure that we stay focused on building a long and fruitful relationship with you.

