

## Online Financial Planning Solutions- Overview, Pricing & Features

<i>Features</i>	Online Single Goal - Based Plan “Udaan”	Online Basic Financial Planning Solution “Swabhimaan”	Comprehensive Financial Planning Solution “Saatwan Asmaan”
<i>Data Collection</i>	Only Basic data	Detailed Financial data	Complete Financial data
<i>Financial Plan Writing</i>	No	Yes	Yes
<i>Recommendation &amp; Action Plan</i>	Yes	Yes	Yes
<i>Execution of Plan</i>	Yes	Yes	Yes
<i>Emergency &amp; 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"> <li>✓ Car/Home purchase.</li> <li>✓ Marriage/Higher Education.</li> <li>✓ Business Start Up.</li> <li>✓ Vacations.</li> <li>✓ Wealth Creation.</li> </ul>	Any 2 of the Basic Goals from below : <ul style="list-style-type: none"> <li>✓ Children’s Higher Education.</li> <li>✓ Children’s Marriage.</li> <li>✓ Car/Home Purchase.</li> <li>✓ Vacation.</li> </ul>	Any 5 Goals including Aspiration Goals such as <ul style="list-style-type: none"> <li>✓ International Vacations.</li> <li>✓ Dream Car/Home.</li> <li>✓ Business Start up.</li> <li>✓ 2<sup>nd</sup> Home Purchase.</li> <li>✓ Wealth Creation.</li> </ul>
<i>Total No. of Goals Covered</i>	2	4	7
<i>Asset Allocation Plan</i>	No	No	Yes
<i>Tax Optimization</i>	Yes	Yes	Along with Tax Planning
<i>Existing Portfolio Review along with Goal-Linkage</i>	No	No	Yes
<i>Restriction on Investment Size</i>	Rs. 20 k p.m / 10 lakhs Lumpsum	Nil	Nil
<i>FREE Online Transaction Platform</i>	Yes	Yes	Yes
<i>Access to Financial Planner</i>	First time via phone thereafter via Whatsapp/ Mail	First time as well as ongoing via Phone / Whatsapp/ Mail	First time as well as ongoing via Phone / Whatsapp/ Mail
<i>Monthly Performance Reports</i>	Yes	Yes	Yes
<i>Portfolio Review Frequency</i>	Yearly	Half - Yearly	Quarterly
<b><i>First Year Fees ( + 18% GST)</i></b>	<b>Rs. 2000/-</b>	<b>Rs. 6000/-</b>	<b>Rs. 12,000/-</b>
<b><i>Renewal Fees (+18% GST)</i></b>	<b>Rs. 500/-</b>	<b>Rs. 3,000/-</b>	<b>Rs. 6,000/-</b>