

*Since we began in Nov. 2011, More than 80 % of new clients have come from word-of-mouth referrals. Here's a glimpse of our clients' experiences:*



"What really impressed me was the way you took the time to get a feeling for where I was at, your depth of knowledge, lateral thinking and your common sense approach. Your team's professional, ethical and caring demeanor elicits my trust and respect."

**Dr. Ajay Bajaj**, Consulting Endodontist & Conservative Dentist.

"I have been your client since 2012. My wife & I are very impressed with the personalized professional service and advice given to us, specifically to suit our situation and future needs. Your structured approach from setting up goals to securing our financial future has made us feel comfortable. We have been gladly recommending your services to others."



**Manoj Ratnaparkhe** - AGM, TCS Ltd.



"My husband and I met Vipul Bane in 2013. We knew how to earn money & save adequately but when it came to financial planning we were novices. After meeting with Vipul, we took on his recommendations and today we are extremely Happy and so have sought his help in planning my parents and sisters finances too."

**Aparna More** - CIO, Accenture India

"We would like to express our sincere thanks for the excellent work you have done for us over the past 2 years. You have brought discipline in our lives & we are now in control of our finances. Your professional acumen & astute advice has already led to significant savings for us. You are always approachable & I never feel uncomfortable asking any questions."



**Mr. Rajiv Pandey**, Head - IT Portfolios & Programs, Tata Motors Ltd.



"It is really refreshing to work with a firm which is truly interested in their client's needs, circumstances and preferences. What really impressed me is Vipul Bane's dedication, patience & sincerity. May you & your firm prosper, along with all your clients."

**Namita Mestry** - Advocate, Mumbai High Court



*"Failing to Plan is Planning to Fail"*

*To Make your Dreams Come True  
& Realize  
Financial Freedom*

*Contact us Now*

☎ 022-65313235/36

✉ [vipul@adyantafinancials.com](mailto:vipul@adyantafinancials.com)

🌐 [www.adyantafinancials.com](http://www.adyantafinancials.com)



**Adyanta**  
Financial Consultancy

*Helping Your Dreams Come True*

*Make Your  
Dreams Come True*

*with a Plan  
that's Right for You*

*Unbiased Advice, Systematic Approach & Passionate Service  
keeping the customer at the centre... Is what defines  
"Adyanta Financial Consultancy"*

Adyanta is a combination of two Sanskrit words – "Aadya" meaning Beginning and "Anta" meaning End. Thus, Adyanta denotes **"from beginning to end"**

We are a New Age Financial Planning & Wealth Management Firm catering to Individuals & Families since Nov. 2011. Today, we are serving over 350 clients globally with an outstanding 99% retention rate and still growing.

Our Prestigious Clientele include Business people, Professionals and Executives spread across Geographical boundaries and Industry Sectors.



**Founder :**

**Mr. Vipul Bane**

B.Sc, MBA, AFP, CPFA

**Financial Planner & Wealth Advisor**

16+ years Experience in BFSI

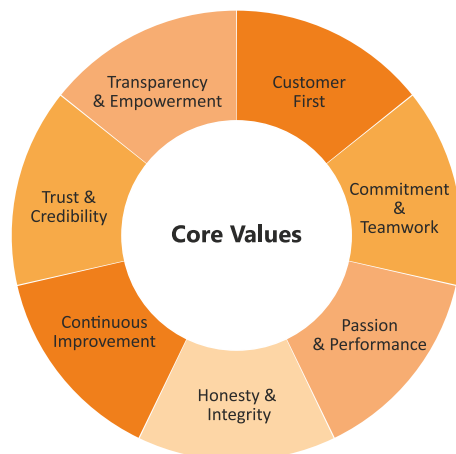
Member - **Business Network International (BNI)**



**Purpose :** To enhance Happiness in the lives of people.

**Vision :** To Be the Most Admired & the Most Preferred Financial Planning Firm in the Country

**Mission :** To Help People Achieve their Dreams & Goals faster & easier than ever before.



## OUR SERVICES

### Financial Planning Services :

- Goal- Based Planning
- Basic Financial Planning
- Comprehensive Financial Planning
- Executive Financial Planning
- Premium Financial Planning
- Retirement & Income Distribution Planning

### Wealth Management

Personalized Wealth Management for achievers like you



At Adyanta we provide you with Simplified & Customized Wealth Management Solutions. The solutions are designed to suit Your Return Expectations, Risk-Appetite & help you achieve your Financial Goals.

### Corporate Workplace Solutions

We Specialize in Conducting Educational Seminars & Workshops on Financial Planning as well as Help - Desk activities for Employees of Corporates to help them achieve their Financial Goals.

### Other Services :

- Investment Portfolio Analysis
- Equities, Derivatives & Commodities Trading
- Income Tax Planning, Computation & E-Filing Services
- Will Writing through specialized Lawyers
- Integrated Real Estate Solutions

### Our Product Range

We have the entire range of Financial Products of all reputed & Trusted brands. These include Saving, Investment, Risk Protection & Liability Products.

## Benefits of Financial Planning



- It helps you take informed decisions about your Financial Future saving your Time, Money & Efforts.
- It Empowers you with the right Knowledge there by preventing you from being a victim of Miss-selling.
- Budgeting brings in discipline and ensures that your Savings Ratio is increased.
- Written down Financial Goals & having a Plan for achieving those increases your success rate.
- Your Overall Portfolio Return is enhanced as a result of Right Asset Allocation & Investment strategies.
- You Achieve your Dreams & Financial Goals through proper management of finances.
- You Realize Financial Freedom, the stage in Life when you no longer need to work for Money.

**Wealth comes when you save  
Wealth grows when you're savvy.**



### Why our clients' choose to partner with us :

- Most Affordable Range of Financial Planning Services
- Entire Range of Financial Products under one roof
- One Stop Shop for all Financial Needs
- Unmatched Expertise & Experience
- Scientific & Systematic Process
- World Class Technology
- Award Winning

