

## Who works for me ?

Arihant Financial Planners are qualified and experienced and **will take the time to listen, explain things clearly and keep you informed.** They are committed to understanding your needs and identifying the best ways to achieve your goals.

### What to expect

#### Establish your financial situation and identify your goals

During your initial meeting you will gain an accurate picture of your income, expenses, assets and debts, and consider the direction you could take to achieve your short term and long term goals and financial well-being.

#### Customise a plan that best suits you

When you choose to proceed, your Arihant Financial Planner will prepare a personalised financial plan, also called Statement of Advice, with recommendation and strategies to help you meet your financial goals.

#### Implement your financial plan

Once you are satisfied with your customised plan, your Arihant Financial Planner will manage the implementation of the plan, keeping you informed of the process along the way.

#### Review your financial plan

Implementing your financial plan is just the beginning of your relationship with Arihant Financial Planner. Keeping in touch with your planner is essential because addressing changes to your personal circumstances, the economy or investments will help you remain in control of your financial situation.



**ARIHANT** capital markets Ltd.

Arihant Capital is a leading financial and broking services firm dedicated to growing the net-worth of individuals and institutions for over fifteen years. With a nationwide presence and a strong team known for its expertise in various fields of finance, Arihant is best positioned to help you reach your financial goals.

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# Financial Planning

Take control and secure your lifestyle

Financial planning helps you fulfill your ambitions - whatever they may be. Whilst you may trust friends and family on many of life's key decisions - a professional financial adviser can help you make informed decisions about your financial future.

You almost certainly have plans - starting a family, buying a home, car, building a home, retiring maybe - but have you looked into the financial implications of turning those plans into reality?

With Arihant Financial Planning group whatever your financial goals, we're here to help you achieve them. Talk to us for expert, financial planning advice that's tailored to your personal needs.



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## When to see a Financial Planner

Very few of us consider our financial long-term future and whether it will fund our lives, hopes, and dreams, although we all know we should.

No matter your age, income, experience or goals, an Arihant Financial Planner may be able to help you increase your wealth, save on tax and secure the lifestyle you want.

If you :

- are single, married, or divorced
- have started your first job or received a promotion
- have your first loan or own a house
- have a family or are planning children
- need to fund the kids' education
- have sold a property or business
- have received an inheritance, redundancy or insurance payout
- are self employed
- want to retire early or are preparing for retirement

...make an appointment with an Arihant Financial Planner today. Arihant Financial Planners are dedicated to helping you prepare financially for life's most important milestones, so you can achieve your financial goals.



Making the decision to see a Financial Planner and preparing a financial plan puts you in the driver's seat. You are deciding to pursue financial security, which ultimately provides freedom and choice.

You don't need to have a lot of money to see a Financial Planner. Your financial wellbeing is dependent on your ability to not only meet current financial challenges, but to maximise your financial situation today so you can achieve the lifestyle you want for the future.

As in life, sport, career and relationships, even finance is born from the same equation...

**Goal setting + planning + commitment = success**

## How can a Financial Planner help me?

At every step of life you need an expert :

- a doctor for a healthy living
- an architect to build your house
- a mechanic to fix your car

Similarly, you need a financial expert to plan your finances at every step of life. Your Financial Planner can assist you during every stage of life from starting out, settling down, having a family, right through to retirement.

They provide an honest assessment of your financial situation, help identify your goals and customise a plan that best suits you.

They can help build and protect your wealth by assisting you to:

- invest for your future
- reduce the tax you pay
- plan and budget your income and expenses
- reduce your loan and debt obligations
- use the equity in your home to invest
- take advantage of economic and legislative changes
- make the most of your investments
- provide you with advice on a selection of investment options
- plan for your children's education and marriage
- make your money last in retirement
- prepare for the uncertainties of life
- improve investment performance- by increasing return & reducing risk
- make the most of redundancies, inheritance & insurance claim payouts
- secure your family's financial future with affordable insurance options



Seeing a Financial Planner is a simple and affordable way to take the hard work out of managing your finances while still leaving you in control. Most importantly, it leaves you with the peace of mind that an expert is working for you to ensure your well-being.

An Arihant Financial Planner will help you keep on the path to financial success by providing you with the advice and support you need.