



YfinAdvisor

Save. Plan. Invest.

amandeep0603@gmail.com
8968567279

YOUR APPOINTMENT TIME _____

STALL _____

NAME AMANDEEP KAUR

SALARIED ☒ SELF EMPLOYED ☐ ANNUAL CTC (₹) 45000/-

DOB 6 March 1991

FAMILY DETAILS

SPOUSE NAME _____

EMPLOYED ☐ SELF EMPLOYED ☐ ANNUAL CTC (₹) _____

DOB _____

DEPENDENT DETAILS

S.NO.	NAME	RELATION	GENDER (M/F)	DOB (dd/mm/yy)
1	—	—	—	—
2	—	—	—	—
3	—	—	—	—
4	—	—	—	—

LONG TERM GOAL (5 YEARS+)	GOAL 1	GOAL 2	GOAL 3
HAVE TO	Retirement		
WANT TO			
SHORT TERM GOAL (1-5 YEARS)	GOAL 1	GOAL 2	GOAL 3
HAVE TO	2018 Car sales	24 hrs Marriage	
WANT TO		15 hrs	
IMMEDIATE TERM GOAL (UPTO 1 YEAR)	GOAL 1	GOAL 2	GOAL 3
HAVE TO	5 hrs (House renovation)	Emergency fund	
WANT TO			

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NETWORTH DETAILS

Name of the Bank	Amount (₹)
STBP	30,000
Punjab National Bank	25,000 (Emergency fund)

Pension Product	Amount (₹ p.a.)
NPS	

Other Savings Products

Product type	Amount (₹)
Government Tax Savers	RD - 10,000 p.m (June'2016 - June'2017)
Post office schemes	
LIC	
Infrastructure Bonds	
Others	PPF - 1 lac p.a

Brokerage accounts

Broker	Amount (₹)

Mutual Funds

Name of the Fund	Amount (₹)

Traditional Investments

Particulars	Type	Amount (₹)
Gold		
Property 1		
Property 2		
Property 3		

Liabilities

Loans	Amount (₹)
Mortgage	

TERMS & CONDITIONS

ARTICLES

The Website is an online platform which provides services such as (i) online tools for financial planning, (ii) a listing of various savings and investment options based on various parameters, and (iii) general financial education collectively called the "Services" to the Users, operated by Yfin Advisor Private Limited (the "Company") incorporated under Indian Companies Act, 2013 with registered office at C-304, CGHS Rose Woods Apartment, Mayapuri Phase I, New Delhi-1100091. Any reference to "you" or "your" or "user" refers to you as a user of the Website and the Services and any reference to "we", "our" and "us" shall refer to the Company as the provider of the Services.

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PAYMENT TERMS

Registration on the Website is free. The Company does not charge any fee for browsing the Website. A part of the Content on the Website will be accessible to every user. However, certain Services and Contents will be available to the Users only on a payment of Rs.1500 for twelve month subscription ("Fees").

SCOPE OF SERVICES

A financial diagnosis report will be prepared by the Company through a software-based algorithm, using the information provided by you and on certain assumptions drawn from the information provided. Incomplete, incorrect and/or not providing of incomplete data could lead to a financial diagnosis report being prepared in context to the data submitted. This could be in contrast to the financial diagnosis report which would have been prepared had all the data been correctly provided. The Company will not be held responsible for diagnosis prepared on incorrect data and it is the users endeavor to ensure that complete accurate data is provided. Any change to data submitted for financial diagnosis will result in a change to the diagnosis. If you want to enter any additional data after submission for diagnosis, the Company has a right to charge you a predetermined amount in order to rework the diagnosis. The Company does not represent that the methodology of the preparation of financial diagnosis report is exhaustive or foolproof. You agree that any such diagnosis or report prepared by the Company is subjective in nature which may or may not result in a diagnosis that is either accurate or suitable to you. The user will receive a quarterly summary of the User Account from the Company or the frequency as decided and informed by the Company post taking the services.

NO RELIANCE ON INFORMATION

Investments are subject to investment risks, including the loss of the principal amount invested. Past performance is not indicative of future results. Prices / invested sum are subject to market risks which may result in appreciation or depreciation. The ownership of any investment decision(s) shall exclusively vest with the user after analyzing all possible risk factors and by exercise of his/her/its independent discretion and the Company shall not be held liable for any consequences thereof.

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- use of the products or services provided through the Website.

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- business interruption,
- loss of anticipated savings,
- loss of business opportunity, goodwill or reputation, or

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USER DECLARATION: I declare that the information I have given on this form and any supplementary pages is correct and complete to the best of my knowledge and belief. I understand and agree to the above Terms & Conditions of the use of Services.

Anuragdeep



अमनदीप कौर
Amandeep Kaur

जन्म वर्ष / Year of Birth : 1991
महिला / Female

9680 7154 6984



आधार — आम आदमी का अधिकार



भारतीय विधि विभाग प्रधान प्राधिकरण
भारतीय विधि विभाग प्रधान प्राधिकरण

पता : : D/O दर्शन सिंह, मकान
नं-९३, खुद्धा लाहोरा, चंडीगढ़, चंडीगढ़,
160012

Address: D/O Darshan Singh,
House NO-93, Khudda
Lahora, Chandigarh,
Chandigarh, 160012



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1800 180 1947

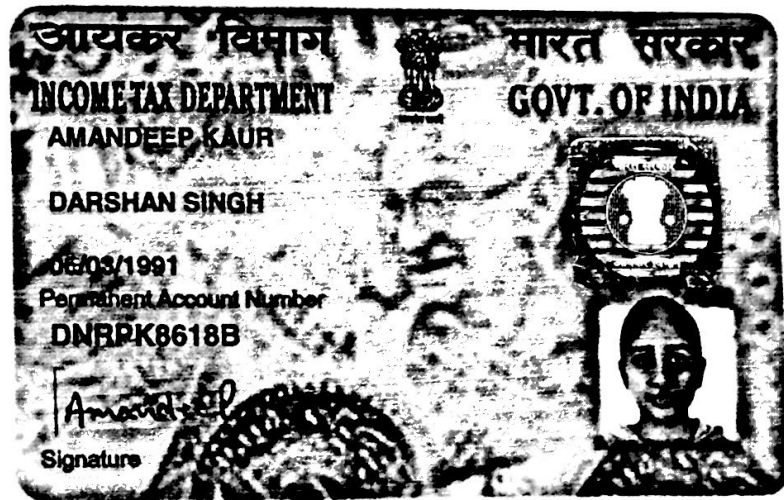


help@uidai.gov.in



www.uidai.gov.in

P.O. Box No. 1947,
Bengaluru-560 001



Amandeep