

I-SOLUTIONS
WEALTH ADVISORY
TODAY | TOMORROW | TOGETHER

SUCCESS

Delivering realistic returns
and offering need based
solutions has always been
our top priority

Bhavin Sheth
Founder



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WEALTH ADVISORY
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THE BIG MONEY
IS NOT IN THE
BUYING AND
SELLING BUT IN
THE WAITING.



ABOUT US

I-Solutions is sculpture from team of young first generation entrepreneur's hard work. The group has gained huge acceptance among High Net worth Individual, Corporate Clients, NRI and so on.....

I-Solutions is an emerging Investment Data Management & Wealth Advisory company managing assets for its corporate and private clients worldwide.

I-Solutions differentiation is derived from a transparent, timely & technology-enabled advisory services delivered by some of the leading talented professionals in the country. I-Solutions professionals are grouped by focus and our clients are able to deal with our professionals who speak their language. Our internal information technology and knowledge management systems enable the delivery of informed and timely advise to clients.

A combination of personal attention, ethical practices, strong research, state-of-the-art technology, streamlined processes has made I-Solutions one of the leading name In Wealth Advisory.

THE MONEY
WHICH IS LEFT
IN BANK ACCOUNT
AFTER YOU DIE IS
THE EXTRA WORK
YOU HAVE DONE
IN YOUR LIFE



FINANCIAL ADVISORY AT I-SOLUTIONS

We know that you must have come across dozens of Financial Advisors and hundred of their services. Trust we are no different but still give a thought to Financial Advising at I-Solutions and then decide, are we in the same line or we are trying to create a different world of Financial Advising.

For us, Financial Advising is not about Products, Returns, Bonus, Annuity, Market Movements, etc. Rather our core emphasis is to first understand:

- Who is our customer? What does he set out to achieve?
- What challenges he may come across
- What is his current situation?
- Are the current finances and future requirements aligned?
- Most importantly, we do not see you as one of our clients, we believe we are One Family

So, we first understand your relationship with money and accordingly start advising resulting into various solutions. Our intent is to be your partner in your every walk of life, no matter where the market moves. We want to be that helping hand which will enhance you in taking better financial decisions be it buying fresh insurance policy, insurance maturity, mutual investments, equity allocations, FD, secured investments, nominations, transferring of wealth from one generation to another, etc. In short, we have 360 degree approach for all our clients which helps us and clients in not duplicating unnecessary investments. And mind you, all of these, without

compromising on the basic necessities like thorough knowledge of market, products, experience, services, etc. You will be surprised to know that our constant follow-up and strong conviction has helped many a clients build a discipline in the line of investments

You must be wondering why do I need to consult a Financial Advisor, when I can do it on my own or I have world's best advisor Google. Precisely, ask yourselves below questions:

- Why do we have Family Doctor?
- Why do we consult Chartered Accountant?
- Why we need only lawyers to fight a case when there is a provision in the court that you can fight your own case!

Answer is simple, we fear "Wrong Decisions" and more than wrong decisions, we fear its impact on our routine life. But, finance is not that simple. Each mistake committed now will only be realised after 4-5 years, which is why the role of Financial Advisors and your involvement in taking efficient financial decisions increases. And these Financial Advisor should have following qualities, like I-Solutions Advisor:

- Thorough Knowledge and Necessary Skills across Markets and Products
- Prompt Sales and Post Services. Should be able to communicate effortlessly
- Genuine player for the long term and not a side business

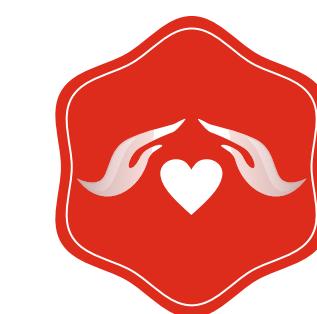
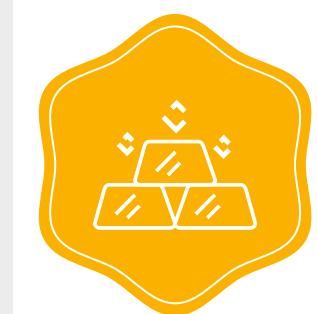
Market ▲ 0.5 ▼ 0.12

Oil ▲ 2.45 ▼ 0.96

Index ▲ 1.56 ▼ 0.78

Ex ▲ 3.6 ▼ 1.65
Gold ▲ 0.02 ▼ 0.25

LAYMAN WORK FOR
MONEY WHILE RICH CLASS
PEOPLE MAKE MONEY
WORK FOR THEM

LIFE & HEALTH
INSURANCEMUTUAL
FUNDSFIXED
DEPOSIT

EQUITY



COMMODITY

REAL
ESTATEPMS
&
AIFHNI WEALTH
MANAGEMENT
SOLUTIONS

WE AT I-SOLUTIONS BRING
YOU WHOLE RANGE OF
WEALTH ADVISORY SERVICES
AT YOUR **DOORSTEP**.



OUR EXPERTISE SOLUTIONS



LEADING INVESTMENT
ADVISORS MANAGING ASSETS
MORE THAN 621 CRORE ACROSS
ALL ASSETS CLASS



ACHIEVEMENTS

Portfolio of our Investors who trust our transparent and ethical advisory.

Assets Under Management more than 621 Crore.

Awarded Rank 1 Financial consultant of HDFC Life pan India

Consecutive 5 Years MDRT & 3 Years COT & 7 Years TOT (USA)

ICICI Prudential Life, LIC MDRT Member & Bajaj Life TOT

Non-life portfolio of Rs. 10,000 Crore plus.

Top 10 Advisors of Mutual Fund In Mumbai.

First company to launch co-branded policies with PSU (Govt.) insurer.

In-House Fully Secured Technology Platform.

NEW INVESTMENT RESOLUTION

EARNING

-
SAVINGS

=
EXPENSES



TIMELINE

2008

- Created benchmark **AUM of 50 Crores** in first year itself.
- I-Solutions gets licence from SEBI to operate its stock broking firm.

PARDESH

- I-Solutions launches 'PARDESH' dedicated advisory services to cater NRI clients

Real Estate Solutions

- I-Solutions opens special services to advise Real Estate Investments to Retail Clients.

2009

Portfolio Stability in Market Slowdown

- I-Solutions adopts emergency steps to stabilize the portfolios of our valuable investor in market slowdown.

Zero Job Cut

- I-Solutions stands out of the crowd in recession declare Zero Job Cut in all group companies.

In-house Tax Advisory

- I-Solutions opens unique in-house TAX ADVISORY services with strong dedicated team.

2010

- I-Solutions parts with major part of companies reserve funds in building in-house technology platform "INVESTMENT KUNDALI"

Advisory for Life Insurance in High Risk Countries

- I-Solutions launches special advisory for Life Insurance in High Risk Countries

2011

- I-Solutions launches its ambitious Partners Program to build strong advisors force nationwide.

Debt Syndication Service

- I-Solutions opens window for Debt Syndication services to HNI & Corporate clients.

2012

- I-Solutions launches its web-portal **isolutionsadvisor.com** as part of business expansion in USA & UK.

2013

Co-Branding with PSU

- I-Solutions steps into launching first ever dedicated insurance policies from Oriental Insurance Ltd. for its clients.

2014

Build In-House Technology for smooth operations

- I-Solutions builds one of its unique Technology for smooth business functioning and client servicing

2015

Successfully Trained Partners on Business Expansion and Strategic Planning

- As part of community building, I-Solutions ventured itself into building strong financial advisors for tomorrow

2016

Expanded footprints in Gulf and Middle East Countries.

- Consistent Client Retention of more than 90% proves our mettle in Advisory and Client Servicing

2017

Historical Achievement

- AUM of More than Rs. 500 Crores

ASHWIN BONDAL – SULZER (SWITZERLAND)

I have known Lokesh and Bhavin right from the time they started out on their own. I was impressed by their enterprise and capacity for hard work. This along with the fact that they had a good grasp of the money market and also a sense of commitment to their customer, made me entrust them to manage my investments. Over the years they have proved that my trust was well placed and have grown and developed steadily but surely. **Their approach to providing a complete solution to their customers will stand them in good stead** and I am sure that they will continue to evolve and grow in the future as they have done so far.

I wish them all success in their endeavor.

WHAT THEY
SAY ABOUT
US ?



RAJ VARMA – ESSAR GROUP

For the last 8-9 years, I have been making all my investments in mutual funds, through I-Solutions only. I have no hesitation in saying that I have always received sound advice and guidance and I am completely satisfied with the performance of my investments. The proof of this is that over the years, **I have recommended I-solutions to many of my friends/contacts and all of them, without exception, are very happy.**

The personal touch that Bhavin and Lokesh provide, their attitude towards all their clients, big or small, their integrity and promptness in service with the smile are difficult to match.

On this occasion of I-solutions achieving, successfully the milestone of 10 years, I wish them all success and prosperity in the future.

**FOR SOLUTIONS TO YOUR INVESTMENT ISSUES,
GOTO I-SOLUTIONS.**

RUPALI GANDHI – PIPAVAV GROUP

Met the I-Solutions duo around 4/5 years ago, from the very beginning they projected enterprise & resourcefulness

3 TENSE – A wonderfully designed comprehensive data software. (Really well thought out) "YOUR INVESTMENTS AT YOUR FINGERTIPS".

FUND SERIES – I enjoy the colorful presentation of recommendations, an apt snapshot of funds, its managers, AUM and all its relevant.

DETAILS – What you need to know, most striking part about Lokesh bhai & Bhavin bhai is their personal interface which I value the most. Wishing them all the very best in all their endeavors.

SUJATA ACHREKAR – PEGASUS ARC

I met Lokesh before I-Solutions was born. Due to busy work schedules, investment strategies and execution was a problem. I used to make very few investments. Lokesh came to me, talked to me initially just to understand how I look at my investments and what have been my expectations and why... Then he discussed and prepared me for charting my goals over next 20-25 years. And then the strategies and investment plans were drawn... Discussed, modified ... And then the execution ... This was very important for me, as it was my 'Peace Plan', my Insurance... He became my friend in need ... So when Lokesh and Bhavin started I Solutions, I was there. The team has worked for my investments, have probably tolerated my non-responsiveness on busy work days... Weeks... months... But persuasively got through me. Helped me complete my investments as per plan... Responded with MIS on my

DR PRADEEP PENDSE – WELINGKAR INSTITUTE

Congratulations to Bhavin & Lokesh and the I-Solutions team on completing 10 eventful years. I have seen them grow from early days. The unique combination of formal BFSI background and professional approach which **Lokesh bring coupled with Bhavin's entrepreneurial, intuitive and relationship based approach backed by an efficient back office has lead to the success of I-Solutions.**

They have also been endearing one other facet

investments, Tax computations of investment gains and many tasks along the investments.

My investment plans as drawn and executed by Lokesh, Bhavin and their team helped me meet my objectives. Realise my Peace Plan irrespective of the turmoils in the stock market.

All this is because they understand their client, their needs, objectives... Are skilled in guiding the client with appropriate path for long and short term... strike a balance between two. They work with clients not for investments... but for the client's objectives... Walk with the client the entire path... from timing the investments, maintaining, monitoring, modifying as per the objective only when required, exiting when appropriate. Relentlessly work for that.

Their success story is their clients who do not / would not move out... Have happily relied on them and are still happy about it.

about them has been that they have always kept the clients interest at the forefront.

They also have this openness to new ideas and new ways of doing business. The effort to build a FinTech platform is one of the best examples of this. My meetings with them are usually 20% work related and 80% on varied topics. I am sure this openness and innovativeness will help them stay relevant. I am happy that they have reached the 10 year milestone and wish them a lifetime of success and prosperity to themselves and to everyone associated with I-Solutions.

SANGHRAJKA'S & JESSICA

A decade ago, it was time for me to take over my dad's long list of investments as he was retiring , came across I-Solutions and was blessed to have always being guided rightly.

With less of greed, but more to take care of clients needs and satisfaction has always been I-Solutions right way of moving further at work.

Been quite lost with quite a few records, I-Solutions services have been par excellence and has been my dad's financial support system all throughout with their right guidance.

My best wishes and my parent's blessings truly for Lokesh & Bhavin.

May you always grow & grow and let your sincerity, honesty and hardwork pay off every bit.

This year 2018, we Sanghrajka's celebrate our 10 peaceful years with I-Solutions.

DR. ARVIND SARDESAI

I came in contact with Shri Lokesh & Shri Bhavin through my son, both of them have given me sound and very professional advice regarding my financial investments which otherwise with my limited knowledge I would not have been able to achieve. **They are very hardworking, honest & keep clients interest upper most in their dealings.** On this occasion, I wish them and their company a bright future and plenty of prosperity.

KARISHMA GAJRA – GAJRA GEARS LTD

Wishing the I-Solutions team all the best for the future years to come .They have given excellent advice in terms of Investment

ALOK MATHUR – ESSAR OIL

I congratulate Lokesh bhai & Bhavin bhai along with the entire team of I-Solutions on the occasion of 10th anniversary of their operations. It is indeed an occasion to celebrate this important milestone. It is now almost 9 years since I was introduced to I-Solutions (Lokesh & Bhavin) and ever since then, my investment portfolio has been looked after by them.

Over these years I have found them very knowledgeable in their field and they have rendered very sound advise on portfolio management.

Always smiling and willing to respond quickly to my calls, both Lokesh & Bhavin are very pleasant individuals to deal with.

I wish them and the I – Solutions team all the very best in future

દક્ષા ક્રમવેશ કોંપારી - ROHEEN CREATION

તારક મહેતાના ઉદ્દેશ્યમાં જે દાખાલ માટે તારક મહેતા ક્રાયર બ્રિગેડ છે અમન્જ અમારા માટે લોકેશભાઈ અને ભાવિનભાઈ તારક મહેતા છે, સગપણ નથી પણ લાગણી ના બંધનમાં બંધાયેલા છે. તમને બંનેને ખૂબખૂબ અભિનંદન અને હુંમેશા આવી રીતેજ ખૂબખૂબ આગળ વધતા રહે ઓવા આશિષ.

KETAN KOTHARI – RIDDHI SIDDHI BULLIONS LTD

The best thing about I-Solutions is the fact that they take care of you completely. **They treat you like your family,** take care of your money with the right solutions and give end –to-end services.

Thankyou!

NIKHIL GANDHI - PIPAVAV GROUP

What you both have accomplished over a decade is extremely praiseworthy as you both think out of box and work with complete passion. Your ever smiling and valuable advice to your clients who are like family to you is something extra ordinary. **You are ordinary team with extra ordinary qualities.** Stay blessed always team I-Solutions

D.S. KATOCH - SCIENTIST BARC

I was advised to invest in ICICI Bank schemes and was introduced to Lokesh & Bhavin who was managing Bank's Investment Section. With previous investment experience I was vigilant about his advice. With time I realised that he explains all aspects of the Investment schemes. **But the most important aspect that I realised was that here is a person who is educating me about all aspects of the proposed schemes,** besides the manner he conduct himself, I realised he is truly my well-wisher.

AKSHAY CHADHA - VAL ORGANICS PVT. LTD.

I have known Lokesh & Bhavin for 10 years and more. **It is sometimes easy to forget that they also handle my wealth. I-Solutions feels like my very own family.** They know the time meaning of long term investments & relationships. For me and my entire family they have created wealth and also security. All of us wish them another 90 plus years of success.

Their simplicity and honest approach will always separate them from others.

ABDUL NAZAR – AKBAR TRAVELS

At my office many financial advisor & banker keep chasing us for investments but services treatment and knowledge is almost out of the crowd with Lokesh & Bhavin.

On lighter side they keep coming to me on and off to my office, **even though I am busy. I meet them, we sit for hours because, I feel stress free with them discussing on many topics like politics, finance, industry.**

I call for juice for them which is very rare for others. I appreciate their hard work on follow up and continuous visit which was made them successful in their business I wish them good luck for the coming years and **their unity.**

SHAMSHAD KHAN – LANDING CLUB CORP. USA

Thank you for partnering with me and my family for 10 long years. You have been there for me even at time when **communicating from USA had its own challenges.** Your financial advice and my well being is much appreciated. Wishing you two more success to come your way!!

N. RAVICHANDRAN - BANKMEN FIN CON PVT. LTD.

Lokesh and Bhavin are in separable twins and perseverance and dedication are their key strengths. **I wish I-Solutions (which was born much after their services on my account)** all the very Best and I am sure with the zeal and energy with these two youngsters we are probably just witnessing the future one of India's largest enterprise in Wealth Creation. God Bless team I - Solutions.

MANSUKHLAL SANGHRAJKA – IMPERIAL MOTORS

Lokesh bhai & Bhavin bhai... Congratulations to the entire team of I-Solutions on completion of 10 successful years. **I-Solutions is a one stop shop for most financial solution.** Your service and response is excellent .You are in tune with what is happening in the financial world. This helps you to take action quickly and efficiently. You genuinely believe in getting the best returns for your clients. What I like is their in depth analysis while prove doing any solution. **Their monthly and quarterly review of the portfolio** with clients is always appreciated with Lokesh bhai and Bhavin bhai, you always gets to learn something and always updated with new products.
I am so happy because of your timely and valuable advise has given a correct direction to our portfolio On this blissful and charming day of your 10th anniversary, may you continue the journey of success with pride. Wishing you all happiness and many more years of success. Great to be associated with you both and looking forward for many more relationship with your company.

SHAIKH FAMILY – EXIT BRAND

We met with I-Solutions in their beginning years. **And it's been a wonderful journey of trust and friendship.** They gave us very profitable advice on some funds, which not only helped us, in some of our urgent needs, but also made us invest in some schemes, to secure our future and children's, so keep up your hard work,to make money for us and yourself!!

UNNIKRISHNANVS – HDFC BANK (DUBAI)

More successful years ahead**let it move to a 1Billion dollar business within next 10 years.**
Happy to know your company is stepping the 1st milestone, a decade in the financial and wealth advisory business.
It reflects the customer acceptance on the individuals and the company.
I am confident with prudent steps toward wealth management and the trust customer will have, this company should be able to grow much further and reach more milestones keeping values and financial disciplines to the utmost value.

GAURAV AGGARWAL - GAURAV IMPEX

After working closely for more than 10 years, we would like you to know that we appreciate and value your loyal assistance. We have watched you grow to a thriving business and sincerely appreciate your responsiveness and the way you conduct business.

We look forward to many more years of mutually beneficial association and wish your company the success that it deserves.

SACHIN KOTHARI – FINKURVE FINANCIAL SERVICES LTD

Thank you for your excellent service. My investment basket is growing with the help of I-Solutions. **I would recommend I-Solutions services to my family and friends.** Their communication and reporting tools are very professional and helpful in every way.

NISARKAZI – FORTUNE GROUP (INDIA-DUBAI)

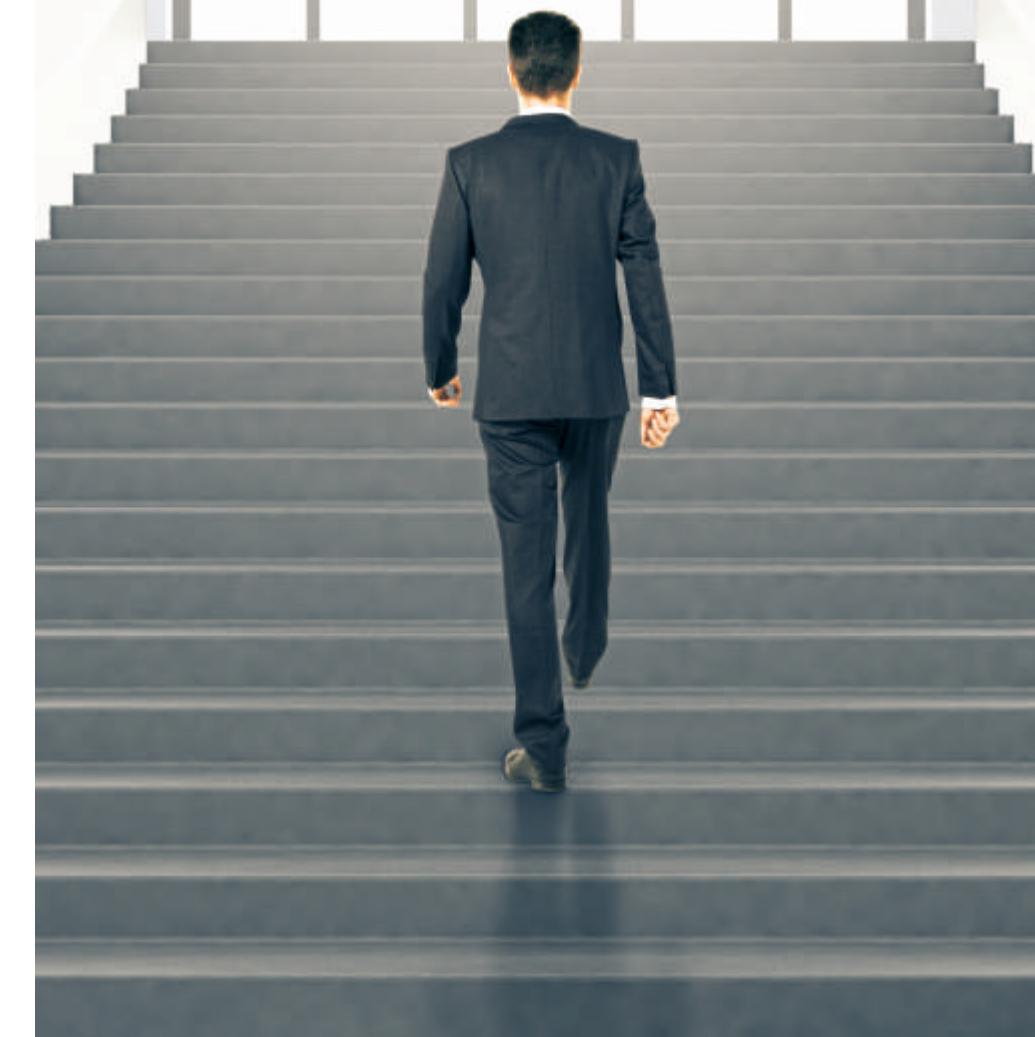
Let me take this opportunity to appreciate your long years of service in wealth management. Through the years, you have consistently shown and given your best at all times. We truly appreciate the years and long service you committed with us. **Your dedication and loyalty will be forever cherished.** More blessings to you as continue giving high quality service in industry. Congratulation on completion of your 10 years in this service. Let's celebrate and cheers!

DR. SANJAY SANGHAVI - MEDI-PHARMA

I-Solutions has redefined the investment and service sector by providing solutions for all at door step in very personalised way. We are extremely happy with their different "i" "s" like instant information, integrity in working , investment options and ideas of keeping updated back office work. **We are associated with them from last 6 years & happy to work long term with them.** All the best to Lokesh & Bhavin and entire team of I-Solutions for completing 10 years

CAPTAIN MAKARAND SARDESAI

Great job Bhavin & Lokesh and team I-Solutions. I am firstly grateful to all of you to help me streamline my finances.
Your advice and solutions were sound and timely. Thank you very much, wish all of you a great success for the future. **All the very best.**





Great things in
business are never
done by one person





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WEALTH ADVISORY
TODAY | TOMORROW | TOGETHER

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