SINCE 18 YEARS

SUCCESS IS

I-SOLUTIONS
WEALTH ADVISORY

TODAY | TOMORROW | TOGETHER

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ABOUT US

We are an energetic bunch of technology geeks and finance experts, passionate about providing the best platform to help you and your family in attaining financial peace.

The concept emerged after decades of serving Indian families while advising them for investments.

What did we observe that an earning member (i.e. investor) of the family runs around, in his lifetime to earn for the family and builds assets for them. But irony is that, family members are many times even not aware of what s/he has been building / investing in.

The outcome is that over INR 82,000crores are lying unclaimed in public and private financial institutions (as per ET 2021 data). If you include Kisan Vikas Patra and other investment classes like Mutual Funds, company deposits, Bonds, physical and demat shares etc. then the amount is apprx. INR 2 Lac crores.

WHAT WE GIVE

(During Life) We help to Digitize, Organize & Track investments in a secured manner and Access Anytime Anywhere through our app.

(Beyond Life) We help dependents in getting claims of Investments of the deceased Earning Member & to advise them how to utilize & benefit from the proceeds.

ACHIEVEMENTS

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

Assets Under Management more than 868 Crore. (as on 31 Dec. 2021)

Awarded Rank 1 Financial consultant of HDFC Life all over India.

Consecutive 5 Years MDRT & 8 Years COT & 7 years TOT (USA)

ICICI Prudential Life, LIC & Bajaj Life MDRT Member.

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.

LEADING INVESTMENT **ADVISORS** IN CITY TODAY MANAGING ASSETS MORE THAN **1000 CRORE** ACROSS ALL ASSETS CLASS

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

LIFE & HEALTH INSURANCE

MUTUAL FUNDS

FIXED DEPOSIT

EQUITY

COMMODITY

REAL ESTATE

TAX ADVISORY

HNI WEALTH MANAGEMENT SOLUTIONS

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OUR APP NOW

Summary Report of Mr. Investor Family

Client Name	Insurance	Fixed Income	Mutual Funds	Equity	Real Estate	Commodity	Total Portfolio	Life Cover
Mr. Investor	30,00,000	17,15,765		28,28,793	82,250,000		89,794,558	50,000,000
Mrs. Investor	12,16,800		29,76,544			42,00,000	83,93,344	20,000,000
Mr. Investor Son	18,00,000			7,53,412	50,00,000		75,53,412	30,000,000
Total	60,16,800	17,15,765	29,76,544	35,82,205	87,250,000	42,00,000	1,05,741,314	

Cash Flow Statement of Mr. Investor Family

2021

Client Name	Fixed Income Interest	Fixed Income Maturity	Rent Receivalbe	Insurance Maturity	Total Inflow	Insurance Premium	Commitments	Total Outflow	Net Outflow	Life Cover
Mr. Investor (Age 56)	137,261		250,000		387,261	300,000	100,000	400,000	-12.739	50,000,000
Mrs. Investor (Age 52)										
Mr. Investor Son (Age 29)			50,000		50,000	180,000		180,000	-130,000	30,000,000
Total	137,261		300,000		437,261	600,000		700,000	-262,739	

2022

Client Name	Fixed Income Interest	Fixed Income Maturity	Rent Receivalbe	Insurance Maturity	Total Inflow	Insurance Premium	Commitments	Total Outflow	Net Outflow	Life Cover
Mr. Investor (Age 57)	113,261	300,000	250,000	250,000	3,163,261	200,000	600,000	260,000	2,903261	40,000,000
Mrs. Investor (Age 53)						120,000		120,000	-120.000	20,000,000
Mr. Investor Son (Age 30)			50,000		50,000	180,000		180,000	-130,000	30,000,000
Total	113,261	300,000	300,000	250,000	3,213,261	500,000	600,000	560,000	2,653,261	

2023

Client Name	Fixed Income Interest	Fixed Income Maturity	Rent Receivalbe	Insurance Maturity	Total Inflow	Insurance Premium	Commitments	Total Outflow	Net Outflow	Life Cover
Mr. Investor (Age 58)	73,261	500,000	250,000	12,828,793	13,652,054	100,000	40,000	140,000	13,512,054	20,000,000
Mrs. Investor (Age 54)						120,000		120,000	-120.000	20,000,000
Mr. Investor Son (Age 31)			50,000		50,000	180,000		180,000	-130,000	30,000,000
Total	73,261	500,000	300,000	12,828,793	13,702,054	400,000	40,000	440,000	13,262,054	
Family Total	323,783	800,000	900,000	15,328,793	17,352,576	1,500,000	200,000	1,700,000	15,652,576	

THUMB RULES FOR INVESTMENT

- Start Early
- Right Assets Class
- Prepare for Unexpected
- Invest for Long Term
- Have A Single Advisor
- Review Portfolio twice a year

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