

## **Client Meeting Summary**

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Client Name: Mr. S. Anbuvel

Dates: 04/07/2025 & 05/07/2025

#### Attendees:

- Mr. S. Anbuvel
- Mr. Anantha Dubey (Assistant)

#### Key Discussion Points (04/07/2025):

- Mr. Anbuvel visited our office along with his assistant, Mr. Anantha Dubey.
- He retired on 30th June 2025.
- He expressed interest in investing Rs.60 lakhs from his retirement corpus.
- He requires a steady monthly income from the investments.
- Based on his moderate risk profile and income requirement, we recommended allocating a majority of the corpus into hybrid mutual funds with a Systematic Withdrawal Plan (SWP) starting January 2026.
- Mr. Anbuvel is new to investing and his KYC was pending.
- He assured that he would submit the KYC documents and proceed with the investments the next day.

#### Follow-up Actions (05/07/2025):

- Mr. Anbuvel submitted all required KYC documents.
- Invested Rs.60 lakhs across 6 mutual funds.
- Requested a Systematic Withdrawal Plan (SWP) of Rs.30,000 per month, starting January 2026.