



 **RiteInvest**  
*Making your future bright*



RiteInvest<sup>®</sup> **KNOWLEDGE** plus your ability will define **SUCCESS**



## Vision

To be recognized as the preferred professional consulting partner & trainer for clients globally in all aspects of financial planning and investing.

## Mission

To provide premier consulting services for clients in the investment management and financial services industry and be instrumental in creating a community of **SMART** financial advisors with the relevant training and tools to best serve their clients.

## Management Team

RiteInvest is a team of professionals with advanced qualifications (MBA, MS Finance, CFA, CFP, etc) from top business schools and institutes across the globe. The team has over 30 years of leadership experience at top MNCs in India and abroad with expertise in finance, training, strategy, consulting, research, quality, sales & marketing.

## Our Philosophy

At RiteInvest, our aim is to create lasting and successful business relationships founded on mutual trust, integrity and quality performance. We firmly believe that we will continue to grow by simply providing unparalleled service to our clients and doing what they would do for themselves if they had the time, desire and experience.

Today's competitive business and uncertain economic environment has created a critical need for trusted and highly knowledgeable Financial Advisors & Consultants, with the requisite expertise & skills to assist their clients in developing an appropriate financial strategy.

The team at RiteInvest brings a unique blend of professionalism, global qualifications & experience to prepare the next generation of **SMART** advisors and offer its clients with specialized consulting services.



## Advisor Training Programs

- Essentials of Financial Planning
  - ✓ ABC of Financial Planning
  - ✓ Client Relationship Development
  - ✓ Personality Development
- IRDA training
  - ✓ Life Insurance
  - ✓ General Insurance
- AMFI certification
  - ✓ Mutual funds – Basic module
  - ✓ Mutual funds – Advisor module
- NCFM certification

## Client Consulting Services

- Insight on Basics of Financial Planning
- Affinity Partnership
- Investment Management services
  - ✓ Active portfolio management
  - ✓ Recommendations & updates
- Real Estate Advisory Services
- Equity Research and Analysis
- Customized Product Offering
  - ✓ Life & Health Insurance
  - ✓ Mutual Funds
- Marketing Strategy & Research Projects

RiteInvest provides a comprehensive approach to investment management, designing investment portfolios and financial plans that complement the client's unique lifestyle.

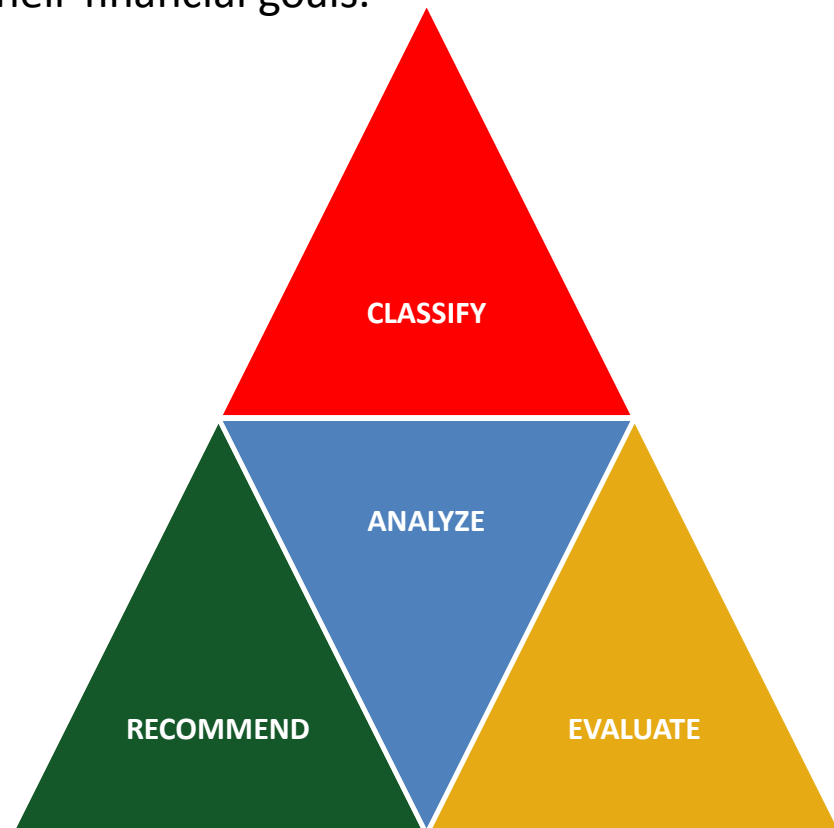
We place strong emphasis on the clients' needs with the primary objective of ensuring their financial security and prosperity. Our simple RiteCARE methodology forms the foundation and serves as the roadmap in assisting them realize their financial goals.

**C**lassify: Determine the financial goals and risk tolerance of the client using our comprehensive investor profiling tool

**A**nalyze: Gain an in-depth understanding of the client's goals to design a customized investment strategy

**R**ecommend: Suggest an unbiased optimal strategy upon screening the universe of potential investment options

**E**valuate: Monitor the client's portfolio and make changes based on market conditions or client needs



\* Trademark registration filed for product

- Management team with strong domain knowledge
- In-house expertise for specialized consulting services
- Products and services designed to offer Best Value for Money
- Flexible customer centric approach
- Focus on long term performance
- Real time investment tracking tools
- Monthly snapshot on global financial markets
- Online platform for expert advice
- Professionally designed training programs
- Exclusive member-only services for financial advisors who are part of the RiteInvest family

