

Goal based Planning Roadmap

Invest 15% to 20% of income



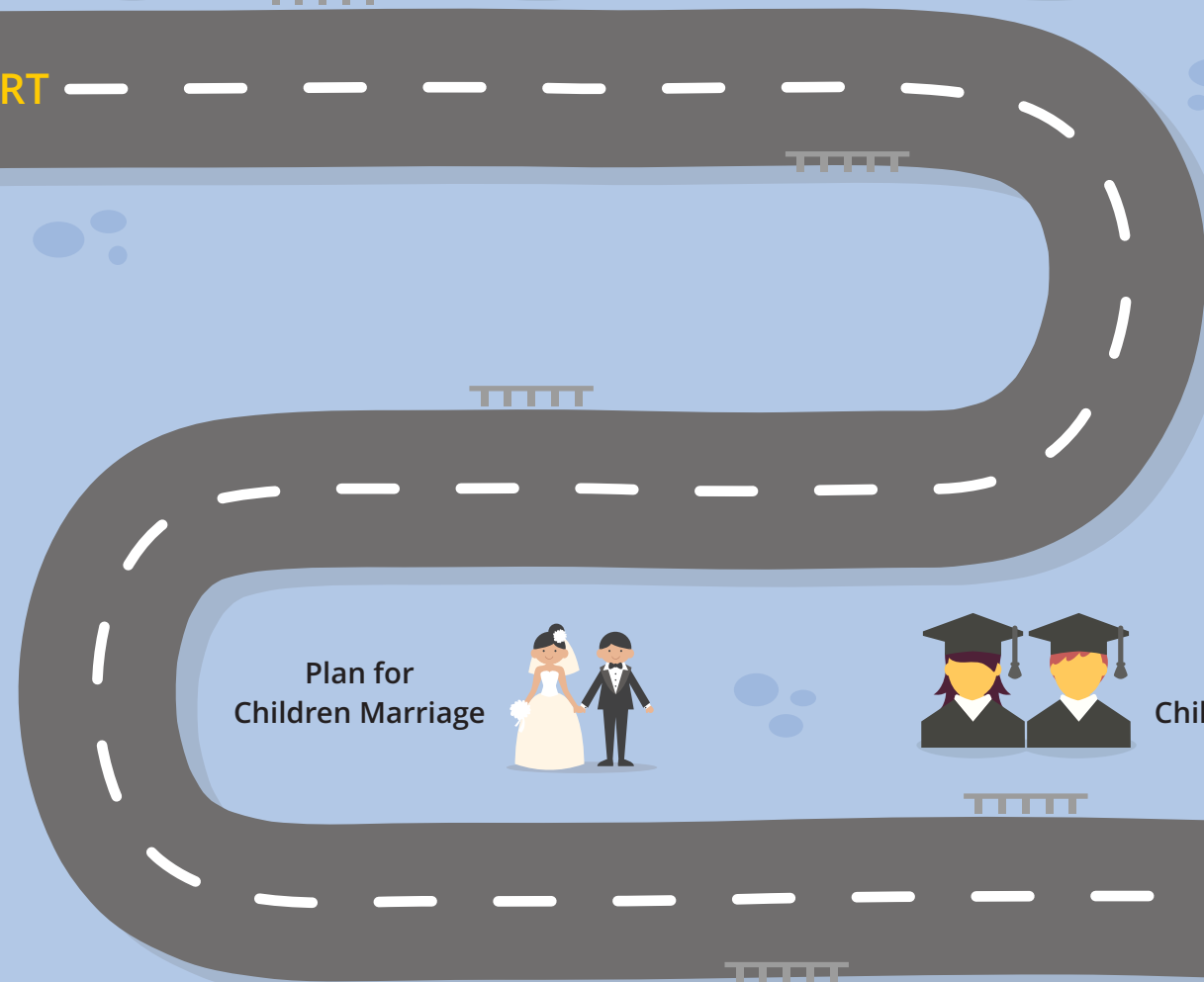
Plan for uncertainties of life like Death, illness and Disability



Tax Planning



START



Plan for Children Marriage



Plan for Children Education



Buying Assets like Property/ car



Retirement planning



Estate Planning



#AskMoreFrom

Life



Get sorted.....Financially



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About Us

Moat wealth was established in 2009 as a goal based investment planning company offering innovative investment solutions with superior risk adjusted returns for its clients by having proper asset allocation of Debt and Equity in the financial portfolio and also rebalancing the portfolio on regular basis as and when required. At Moat Wealth, we continuously focus on Relationships and offer personalized services to each of our clients.



Services

Tax planning

Tax planning is the art of arranging your investment in ways that postpone or avoid Taxes.

- Shortest Lock in period
- Save Tax
- Tax-Free returns
- Wealth creation through power of compounding

Insurance Planning

Ensures protection against financial loss arising out of Illness, Critical Illness, Disabilities caused due to accidents and Demise of bread winner.

Goal Based Planning

A Goal without a plan is just a wish.

- Identify your Financial Goals
- Quantify your goals
- Plan and Invest towards your goals
- Evaluate and Review

Comprehensive Planning

- Insurance and Tax planning
- Saving and Wealth Accumulation
- Growth and Diversification
- Wealth creation

Wealth Management

Wealth Management helps secure your future by providing innovative and personalised management of your assets like Debt, Equity, Gold and Real estate. Our expertise team helps you in selection and monitoring of products and services to manage your assets.

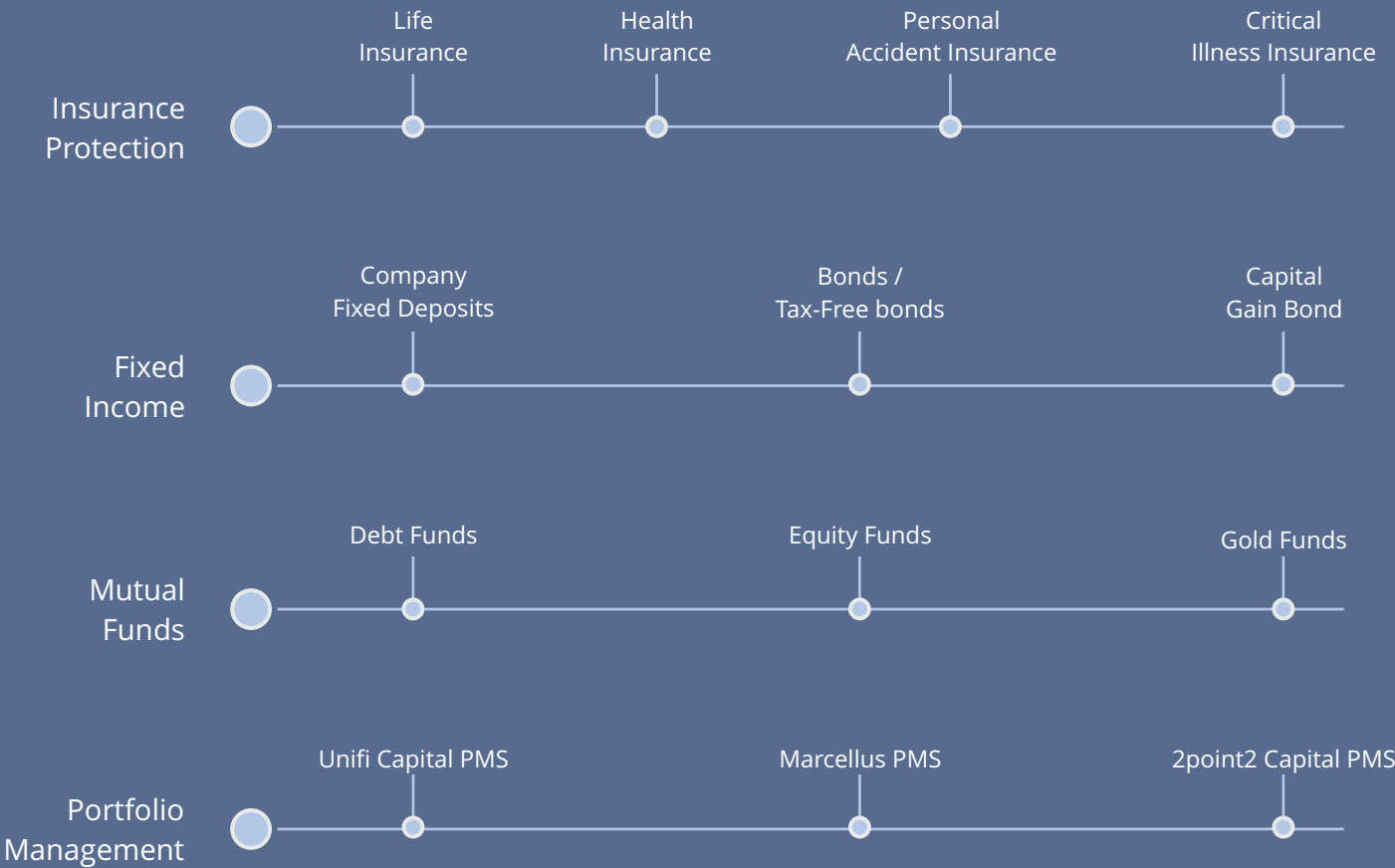
NRI Services

No matter where you are, we are always there for you.

India has turned into a splendid investment destination for Non Resident Indians and persons of Indian origin. A growing and robust economy, profitable companies have together ensured that investors get maximum returns from both equity as well as debt investments.

Our online services will help you to manage your investments from any part of the world

Product Snapshot



Everyone is impacted by money in their day-to-day lives. However, few of us actually know the art and science behind it. It is imperative to gain financial literacy and understand how wealth is created. The session covers a few aspects of Money Management that will set up the thinking process of the investor in the direction of achieving his financial goals.

Key Takeaways:

- Tax Saving
- Planning for uncertainties of life
- Understanding the core principal of Wealth Creation
- Taking better investment decisions
- Renewed inspiration to focus on long term wealth creation and Financial Freedom