Neitin Anjali Baapat

Empower People to Live their Desired Lifestyle by helping them to Achieve **Financial Freedom**

I am Neitin Anjali Baapat, a Financial Transformation Coach with over 20 years of experience in Stock Broking, Portfolio Management & Financial Planning. As the Founder and Head Strategist of PNV FinServ Pvt. Ltd. (an AMFI-registered Mutual Fund Distributor) I manage over ₹50 crores in Client Assets & help 200+ Families Achieve Financial Freedom. Having attained my own Financial Independence in 2016, I am dedicated to guiding others on their Financial Freedom Journey.

VISION

To Educate people about Financial Literacy, Inspire and Empower them to Live a Financially Confident, Stress-Free & Freedom Life.

MISSION

Transform the Financial Lives of 500 Families by Achieving their Financial Freedom Dream through our Unique Scientific Money Management Process.

MY VALUES

E **EXPERTISE -** I Provide Expert Money Management Recommendations.

T **TRANSPARENCY -** I am Transparent & Fair in all my Client Dealings

H **HOLISTIC -** I have Empathy & Respect for my Client's Goals & Dreams.

I **INTEGRITY -** My Clients trust me for my Honesty, Integrity, and Reliability.

C **CLIENT FIRST -** I provide Client First Approach & Unbiased Advice.

S **SOLUTIONS -** I provide best possible solutions to my Client's Problems.

UNIQUE 5 STEP SCIENTIFIC MONEY MANAGEMENT PROCESS.

1 CURRENT ASSESSMENT
Current Financial Assessment & Portfolio Review

2 REQUIREMENTS ANALYSIS
Understanding & Analyse your current & future Financial Requirements & Goals

3 CUSTOMISE STRATEGY
Provide Customised Financial Strategy & Services

4 EXECUTE STRATEGY
Execute your Customised Financial Strategy & Services

5 MONITOR & REVIEW
Monitor & Review your Customised Financial Portfolio , on an ongoing basis

OFFERINGS

Cash Flow Analysis

The Process of Tracking and Evaluating the movement of Income & Expenses.

This Analysis is crucial for Managing the Finances Effectively & Avoid Financial Stress.

Loan Management

Involves Understanding your Loans & making informed decisions about Borrowing and Repaying.

This Process helps to minimize Financial Stress, reduce Interest Payments & Avoid falling into Debt Traps.

Risk Management

It involves Identifying, Assessing & Taking Steps to minimize the Potential Financial Risks that could negatively impact your Financial Situation.

Effective Risk Management ensures that you are Financially prepared for Life's Uncertainties, like - Job / Business Loss, Illness or other unforeseen circumstances.

Portfolio Management

Creating a Personalized Investment Strategy that aligns with your Financial Goals, Right Balance of Risk and Return & Time horizon.

Offering them Tailored Solutions - based on their Unique Financial Requirements.

Risk Profiling

Assessing an Individual's Willingness & Ability to take on Financial Risk.

Understand your Risk Tolerance (i.e. How much risk you are comfortable with) & Risk Capacity (i.e. How much risk you can afford to take) based on your Financial Situation & Goals.

Investment Suitability Analysis

Ensures the Investments are appropriate for an Individual based on their Financial Goals, Risk Tolerance, Overall Financial Situation & Other Personal Factors.

Comprehensive Financial Goals Roadmap

A Strategic Plan that Outlines Specific Financial Goals , Steps required to Achieve them & Timeline for Completion.

The Roadmap provides Structure, Clarity & Direction for Managing Personal Finances & Achieving Financial Goals.

Wealth & Legacy Management

A Personalised Comprehensive Plan for Wealth Creation and Transferring Wealth across Generations in an Efficient & Purposeful manner.

OFFERINGS

Financial Literacy Workshops

Workshops help to Improve participants Financial Knowledge & Skills and make them take Informed Decisions to build their Solid Financial Future.

Workshops are conducted on various Financial Topics, like – Basics of Money Management , Importance of Risk Management , Understand Risk Profiling, How to Achieve Financial Freedom & many more.

We conduct Educational Sessions for specific groups, like –

- Senior Corporate Employees of Engineering / Manufacturing & Software/ IT Companies
- Business Owners
- Professionals – Doctors , Lawyers & Consultants
- Retirees & Individuals (who are 50 yrs. & above)

Financial Assessment

The Process of Evaluating an Individual's Financial Situation to Understand its Current Financial Health & Recommend Corrective Actions to Improve it.

The Goal is to have a comprehensive understanding of where you stand Financially today, so that you can make informed decisions and plan effectively for your future.

Financial Assessment is the 1st & Important Step in your Financial Freedom Journey.

connect@nabaapat.in
+91-94226-39279
www.nabaapat.in

Nav Prachi Co-op Hsg. Soc, Unit No. 13, Ground Floor, Near Dyanada High School, Karve Nagar, Pune - 411052