



OPPORTUNE WEALTH- SERVICE MENU		
S.N.	Service	Description
1	Equity Advisory	We create stock portfolios with listed Indian companies or USA listed companies, using Opportune Wealth proprietary stock research. Our asset allocation has a proven track record of reduced volatility across market cycles and average of 15.6% returns per year over a period of 5-7 years.
2	Mutual Fund Advisory	We create a mutual fund portfolio with a good mix of Equity, Debt and Liquid Mutual Funds based on your requirements. All investments are recommended after thorough research of the underlying holdings of the mutual fund, taking into consideration your risk appetite.
3	Mutual Fund Portfolio Review	Not sure which mutual fund to keep or sell? Opportune Wealth team will review each of your Mutual Fund Holdings in detail and recommend an Action Plan to ensure that you make the right investment decisions.
4	Retirement Consultancy	Includes end-to-end consultancy and handholding for a dignified and respectful Retirement. The service will enable you to have adequate funds at time of retirement to ensure you outlive your money and also if possible leave behind a legacy.
5	House Purchase Consultancy	Includes total cost analysis, Rent Vs. Buy analysis, Home Eligibility checking, Investment Plan for Creation of Funds for Down-payment, Analysis of Ideal Budget for First House or Upgrade House.
6	Organizing Personal Finance	Opportune Wealth team will assist your family in organizing information about all your assets, liabilities and investments all in one place. The consultancy will help you think long term about increasing your net worth and how to become debt-free.
7	Will Writing	Opportune Wealth team will assist you in creating a Will for a smooth distribution of assets to your loved ones. Often a simple step, but rarely taken up seriously. We will make sure that you have a Will in place.
8	Guardianship Agreement	A child is the most important asset one creates in their lifetime, and many forget to select a guardian for their minor kids. Opportune Wealth will assist you to create a Guardianship Agreement for your child.
*All fees details will be shared in a detailed discussion with you		