



ARN-117295

AMFI Registered Mutual Fund Distributor
and SIF Distributor

Sahayak Associates *Ethics Oath*

- E**xpertise - Constant Upskilling and Learning
- T**ransparency and complete confidentiality - Trust is paramount and cannot be broken at any cost
- H**olistic solution - Sahayak 3i
- I**ntegrity - Believe in complete integrity, honesty and have zero tolerance on this account
- C**lient First Always
- S**olutions Oriented - Don't sell products, provide solutions and only do goal based decisions and have a long term orientation

Investment *Mantras*

1. Goal Based Investment only - No Piecemeal Investing. Believe in the power of compounding.
2. Asset Allocation is paramount with the help of delayed gratification.
3. Zero Speculation, Zero Debt and long term orientation.
4. Long-Term Wealth Creation. No short-term solutions.
5. Don't try to time the market.
6. Follow the RISK-PCR strategy. Understand RISK and Client reaction to risk and plan accordingly.
7. RRR - Review and Rebalance regularly.
8. Our first order of business is protection of capital, then growth & final creation of wealth.
9. We are only interested in long-term relationships; believe in regular engagement to develop the same.
10. Our endeavor is to promise less and deliver more. We shall always honor all commitments, come what may.

"It takes less time to do things right than to explain why you did it wrong."

Welcome to *Sahayak Associates*

Sahayak Associates helps people to live up to their fullest potential and become financially independent, giving them the choice to follow their passion by ensuring they have enough financial resources.

Our Financial Distribution is simply the vehicle through which we can take these passions, apply them to the things that people need, and make a profit in the process.

In other words, Sahayak Associates, our business firm, is our 'Ikigai.

We have a strong belief that tremendous wealth is going to be created in the next 10 years in India when the economy moves from a \$4.0 Trillion GDP to a \$10 Trillion economy and the per capita income moves from \$3000 to \$8000.

We want to position Sahayak Associates as your personal family CFO and a vehicle for family, friends, and associates to benefit from this wealth creation and take advantage of the "Chronological Lottery" this opportunity offers.

We offer a Holistic Sahayak 3i Solutions

- Insurance for Protection
- Investment for Growth
- Inheritance for Distribution



"Someone is sitting in the shade today because someone planted a seed a long time ago."

Vision

Statement

At SAHAYAK, Our goal is to build, nurture, and sustain Client wealth by empowering our customers to make smart decisions about their finances and achieve their Goals.



Mission

Statement

- We shall help our clients work towards and maintain financial prosperity by implementing strategies that seek to maximize the growth, preservation, and tax-efficient management of corporate and personal wealth with the finest financial thinking, products and execution.
- We are committed to maintaining the highest standards of integrity and professionalism and seek to provide our clients with excellent service and results in consonance with their financial goals.
- We are committed to enriching society by delivering superior investment services by continually challenge conventional wisdom and actively encourage change in order to pursue growth.
- We are committed to putting our clients at the heart of our business by developing and maintaining long-standing relationships based on trust. We are one firm, committed to delivering the full range of our capabilities, knowledge and resources to meet the needs of our clients.
- We shall make our clients feel confident about their financial future and shall become the Firm of Choice for employees, the financial service provider of Choice for clients, and the Investment of Choice for stakeholders.

"We are limited. not by our abilities but by our vision."

The *Sahayak Process*

We understand that no two people are alike and that each client will have a unique set of objectives. We use a 5-stage process to ensure that the services we offer are suited to client's current circumstances and adapts to their future needs.



Meet and Understand

An introductory meeting for your financial health checkup, to discuss your immediate plans as well as your long-term needs and goals.



Analyze

We analyze and understand your financial, human, and emotional priority of life goals, your current saving potential, and the current portfolio mix. We then decide upon your future investment requirements to achieve your goals.



Plan and Execute

Your Relationship Manager will draw up your individual investment plan, that will help you achieve your financial goals.



Support

Your Relationship Manager will continue to work with you as your plan evolves in response to your changing needs and circumstances.



Review

Every six months, a two-hour session is conducted by our team to review the strategy, and your goals and rework the investment strategy if required.

"It's all rigged in your favour. Trust the process enjoy the journey"

Product Basket

Across Various Asset Classes



Mutual Funds Distribution



Insurance Products Distribution



Capital Markets - Direct
Equity and Portfolio
Management Services



Estate Planning, Will Writing and
Will Execution, Family Trust and
Business succession



Fixed Income Products



AIF/SIF/ Smallcase /
Unlisted Equity



SME M&A
Investment Banking



Real Estate Consultancy



Debt Advisory



Realty and Home Purchase
Consultancy



FIDOK (Financial
Information and
Documentation Kit)



Family Office Services



Retirement Consultancy



Personal Finance Workshops

"I would rather lose half of our clients than half of our client's money."
- Jean Marie Evillard

Why should you

Choose Mr. Sahayak

We are totally client driven and have a long-term orientation. For us, client dreams and financial goals are sacrosanct. We handle client portfolios with empathy and integrity and our team is committed and totally focused to help clients achieve financial goals.

We are process driven and strongly believe in Our Mission, which is to build, nurture, and sustain client wealth by empowering our customers to make smart decisions about their finances. Our first order of business is protection of capital, then growth and finally creation of wealth.

A personal relationship with an experienced and qualified professionals can help you plan for your family's future. Working with our dedicated financial professional can help simplify the complexities of managing your financial picture, and help you achieve the vision you have for your family. We, at Sahayak, offer a comprehensive 3i service-Insurance for Protection, Investment for Growth and Inheritance for Distribution to next generation and we make use of a full range of Sahayak strategies and solutions to help you build, manage and preserve your wealth now and for the future. Work one on one with your financial professionals and specialists in person, online or by phone.

A total Digital platform giving you the convenience to check, transact or review your investments sitting at home or anywhere in the world.

We offer a holistic Sahayak 3i solutions Insurance for Protection, Investment for Growth and Inheritance for Distribution.

*Call today to make a **Wealth Planning appointment!***

Omotenashi

Omo-THE-NAH-SHEE

The japanese practice of selfless service.
Bestowing compassion and empathy and showing the utmost respect.

Why

Sahayak Associates?

1. Qualified finance professionals to handle your investments.
2. Comprehensive Process driven approach.
3. 100% Digital Platform- Buy, Sell, Top-up 24*7 sitting anywhere in the world.
4. Complete financial health checkup.
5. Risk Profiling and Risk Assessment based on our PCR formula.
6. Asset Allocation and Category Allocation based on your requirement.
7. Solutions and goal oriented financial plan and implementation.
8. Customized investment strategies to optimize returns.
9. Regular reviews and rebalancing.
10. Constant client engagement and quick response time.

What do

We Do?

1. We Reduce Complexity

We highlight what is important and critical and what should be ignored.

2. We help you take Action

We help clients take informed decisions and avoid procrastination.

3. We help increase your Conviction and Confidence

We share the latest updates, invite you for industry seminars and webinars to help you understand the journey of investments.

4. We help you feel Safer

We understand your anxiety regarding your hard earned money and are available 24*7 to hold your hand and ride the volatility.

5. We help you Dream Big

We make you understand what is possible in the long run.

We believe in the miracle of Compounding and help you achieve your financial goals.

We make a difference!



SANDEEP SAHNI

Co-founder, Sahayak Associates



Academic Qualification and Experience

After completing his schooling at St. Johns, Chandigarh (Class of 1980) and Modern School, New Delhi (Class of 1982), Sandeep did his B. Com (Hons) from Shri Ram College of Commerce, Delhi University (Class of 1985). Sandeep is an alum of IIM Lucknow with a Post Graduate Degree (MBA class of 1988).

Sandeep's investing experience and study of the Financial Markets spans over 30 years and has been advising more than 500 families across the globe on Financial Planning and Wealth Management.



PUNEET KOHLI

Co-founder, Sahayak Associates



Academic Qualification and Experience

Puneet is a graduate from Bombay University and has over 25 years of experience in the Finance and Insurance Industry and serves more than 4000 Insurance Clients across the globe. He is an MDRT member and holds certifications such as QPFP, along with multiple certifications in Financial Goal Planning, reflecting his deep expertise and commitment to the profession. Puneet brings vast experience in client relationship management, ensuring long-term trust, personalized solutions, and consistent client satisfaction.



VAIBHAV SAHNI

Business Development Manager,
Sahayak Associates



Academic Qualification and Experience

After completing his schooling at St. John's, Chandigarh (Class of 2018), Vaibhav pursued a Bachelor of Commerce (Hons.) from NMIMS, Mumbai. He is a CFA charterholder and a Certified Financial Planner (CFP). In addition, he has earned multiple certifications in financial planning and investment advisory, further strengthening his expertise in finance and portfolio management.

As a Business Development Manager, Vaibhav plays a key role in enhancing client relationships and expanding our financial planning services with a strong emphasis on trust and transparency. He actively supports the team in identifying growth opportunities and crafting strategies that align with client needs—while maintaining the highest ethical and professional standards.



What do we make, they ask, And we proudly say...
WE MAKE A DIFFERENCE!!

TEAM SAHAYAK



Contact us on +91-98728-04694

For a Free Financial Health Check Up!



A team built on Trust and One Vision - Powered by Performance

Disclaimer

Sahayak Associates is a trusted mutual fund distributor registered with AMFI, committed to helping individuals and families make informed financial decisions. The information provided in this brochure is intended solely for general informational and educational purposes and should not be construed as investment advice, financial recommendation, or an offer to buy or sell any financial product or security. Investors are strongly advised to consult their financial advisor or investment consultant before making any investment decisions.

All investments are subject to market risks and may fluctuate depending on market conditions, economic factors, and other external influences. Past performance of any scheme or investment product does not guarantee future returns. The value of investments may rise or fall, and investors may not get back the amount originally invested. Any projections, statements, or expectations mentioned are based on current market understanding and are subject to change without notice.

While every effort has been made to ensure the accuracy and reliability of the information contained herein, Sahayak Associates, its partners, employees, associates, and affiliates do not guarantee the completeness or accuracy of the content and shall not be held liable for any direct or indirect loss arising from the use of this information. Mutual Fund investments are subject to market risks. Please read all scheme-related documents carefully before investing.

Sahayak Associates is AMFI Registered Mutual Fund Distributor and SIF Distributor.

SAHAYAK: Proud to be the member of -



SAHAYAK®

3i Insurance Investment Inheritance

Proud to be NJ partner



Head Office: Sahayak Associates, PHD Chamber, Sector 31 A, Chandigarh 160030
Delhi NCR: The Circle Work, 3rd Floor, Huda City Centre, Sector 29, Gurugram, Haryana 122022
Tel: +91-99141-46888(ChD), +91-9915-903088(Delhi) | Mail: info@sahayakassociates.in
www.sahayakassociates.in