



PLAN YOUR MONEY

FINANCIAL FREEDOM

Are you unable to decide where to invest?

Every individual is unique and so is your risk profile which determines the kind of investor you are.

You may have various goals with differing horizons.

It is important to choose the right type of investments that will best help to achieve your goals

Financial planning is about more than just good advice and investment returns.

It's about the

GUIDANCE THAT YOU CAN TRUST

We help you find your

TRUE NORTH

to achieve your financial dreams, goals & aspirations through SMART choices



Our services:

- ✓ Mutual fund advisory & investments
- ✓ Wealth management, Asset allocation
- ✓ Rebalancing portfolio

What makes us unique?

- Risk profiling & risk based investment recommendations
- Assessment of existing portfolio & guidance in re-balancing
- Personalised unbiased investment choices
- Understanding your goals & aspirations & help in making the right investment decisions
- Hassle -free transactions (SIP/ Lumpsum)
- Periodic assessment & reporting of your financial growth & well-being.

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Subramanian Venkateswaran

A fin-tech entrepreneur with rich IT experience & passion for personal finance. He is practicing financial planning for over 8 years. He has obtained Executive MBA from IIM - Bangalore. He is a Certified Financial Planner (FPSB) & mutual fund distributor. He loves to help his clients achieve their financial goals & promotes financial literacy through his blogs.



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6 factors you didn't know about SSY

Our clients speak:

“ Subramanian has been managing my goal based portfolio for the past 2 years . As somebody who has a deep understanding of the financial markets with over 2 decades of experience, he provides unbiased advice to meet the goals comfortably - by avoiding undue risks & concentration. He not only provides comprehensive recommendations, but also goes out of the way to walk us through the rationale of asset allocation, diversification, disciplined periodic review & more importantly targeting achieving our goals by sensible risk taking.

Ramachandran G, Senior Financial Services Leader in Global MNC Bangalore

”

“ Subramanian has been a trustworthy financial advisor I have met so far. He provides right set recommendations that helps achieve our financial goals. His practical goal driven approach is the uniqueness of his service.

Manoj Kumar, Techie, Bangalore

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