



MyGuide2Wealth

Unlock Your Financial Potential

www.myguide2wealth.com



CFP  
CERTIFIED  
FINANCIAL  
PLANNER

SEBI  
REGISTERED  
INVESTMENT  
ADVISOR

NISM  
EQUITY  
RESEARCH  
ANALYST &  
EQUITY  
DERIVATIVE  
SPECIALIST

MyGuide2Wealth

Why Guide2Wealth



At MyGuide2Wealth , we are not just financial advisors – we’re your partners on a journey towards prosperity. With SEBI RIA, CFP, NISM Research/Derivatives Analyst credentials , we’re equipped to offer you the guidance to transform your financial dreams into reality.

We are amongst the few, who combine **Financial planning + Equity Portfolio** building for same flat fee without any commission.

Independent, Unbiased FEE  
Fee only Advisor

Affordable fee for Financial Plan  
& Portfolio Building

Building your Equity Portfolio,  
be part of India bull run



### Wealth Building Strategy for You



#### Equity Mutual Funds: Risk Profiling + proper Asset Selection

- Suitable mix of index , large cap , mid cap , small cap , sector funds , international funds
- Selection not based on \*\*\*\* rating but on consistency derived of 5yr/3yr /1yr rolling returns

#### Debt Portfolio Balancing

- Best performing debt funds /High yield NCD/Bonds with credit rating .( higher than FD rates)
- Building guaranteed fixed income portfolio (PPF/ EPF/ NSC /Sukanya / SCSS)

#### Equity: Be directly part of India's Bull run

- **Passive** investing – Nifty/Bank/PSU/IT /FMCG/Infra/Pharma /Gold/NASDAQ
- **Growth** investing – Safe investing with large cap / Blue chip.
- **Value** investing – Handpick stocks at demand, expected to turnaround in near future.

**INVESTMENT PLANNING**  
Grow Wealth

**RETIREMENT PLANNING**  
Securing Tomorrow

**CHILDREN'S GOAL**  
Investing in Dreams

**NET WORTH ASSESSMENT**  
Know Your Financial Health

**INSURANCE & TAX PLANNING**  
Safeguarding Tomorrow



+91 9811031535

support@myguide2wealth.com

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G-284, 2nd Floor,  
Sector 63 , Noida , UP -201301