



Y A S H
G O H I L

FINANCIAL ADVISOR



INTRODUCTION

Welcome to gohil yash Financial advisor Services. We collaborate with Angel One for Demat account services and Tata AIA for comprehensive insurance solutions, ensuring a seamless investment experience. Our credentials include the "Capital Market (Dealers) Module" certification from NSE Academy's Certification in Financial Markets (NCFM), underscoring our expertise. With over **4.5 years** of successful experience in the stock market, we bring in-depth technical and fundamental knowledge to guide your investments.

SERVICES I PROVIDE

As a dedicated financial advisor, I offer a range of comprehensive services designed to maximize your investments and secure your financial future. These services include Investment Management, Risk Assessment, Tax Optimization, Portfolio Diversification, Retirement Planning, and Educational Resources.

IN COLLABORATION WITH



THE SERVICES



As a financial advisor, I provide a wide range of services designed to enhance your investments and ensure your financial future:

Stock Market Services (in partnership with Angelo One):

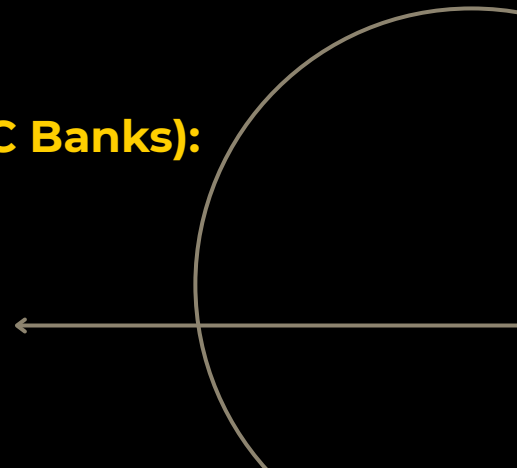
- Open a demat account
- Portfolio management
- Equity investments
- Mutual funds
- Futures and options
- Intraday trading
- Portfolio restructuring

Insurance Services (in partnership with Tata AIA):

- Health insurance
- Medical claims
- Traditional plans
- Market-linked plans
- Retirement plans
- And many more

Loan Services (in partnership with N B F C Banks):

- Home loans
- Mortgage loans
- Personal loans
- Business loans



OUR APPROACH TO COLLABORATION



Our Approach:

We believe in a partnership that aligns our interests with yours. When you invest with us, our fee structure is as follows:

- **We take a 40% share of the profits (60% for you) when you gain.**
- **In the event of a loss, the loss is borne entirely by you. We do not participate in any loss-sharing.**

Account Management:

- Your Demat account will be opened under our sub-broker tag at Angel One.
- We will have access to view and manage your account for effective monitoring.
- All trades will be executed in your Demat account for full transparency.
- You will be required to send us screenshots of the trades placed based on our advisory.





Profit and Loss Sharing:

- Our commission, 40% of the profit, will be transferred upon the closure of profitable trades.
- In case of a loss, we will not charge any commission until we recover your capital amount.
- After capital recovery, our 40% commission on profits will resume.

Our Commitment:

- We assure you that in case of losses, we are dedicated to using our technical and fundamental analysis to recover your investments. Your trust is of utmost importance to us.

Disclaimer:

"Investments in securities are subject to market risk."



Thank You

CONTACT US

We look forward to the opportunity to assist you in achieving your financial objectives. Please feel free to contact us for any further information or to discuss this proposal in detail.

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