







## VISION

Our core values are integrity & intentions. Our vision is to be the pioneer in offering innovative solutions to families for their wealth creation & financial freedom.



## MISSION

Transforming lives is our mission. Providing scientific financial planning, structured portfolio advisory, simplified risk solutions & our unique passive income strategies create financial freedom. Helping accomplish dreams & lead a spectacular life!



## BLUE PRINT

1,00,000 Happy Families  
1,000 Cr. Assets Under Management  
100 Branch Offices  
10 Global Presence

**TRANSFORMING LIVES**  
**IS OUR MISSION**







**DREAM**  
=  
**DESIGN + DISCIPLINE**

Dreams propel our aspirations to live. Many dreams get fulfilled, while some look farfetched. Dreams are a virtual representation of what you want.

IDEOLOGY

ASSET ALLOCATION  
=  
ONE MAN ARMY

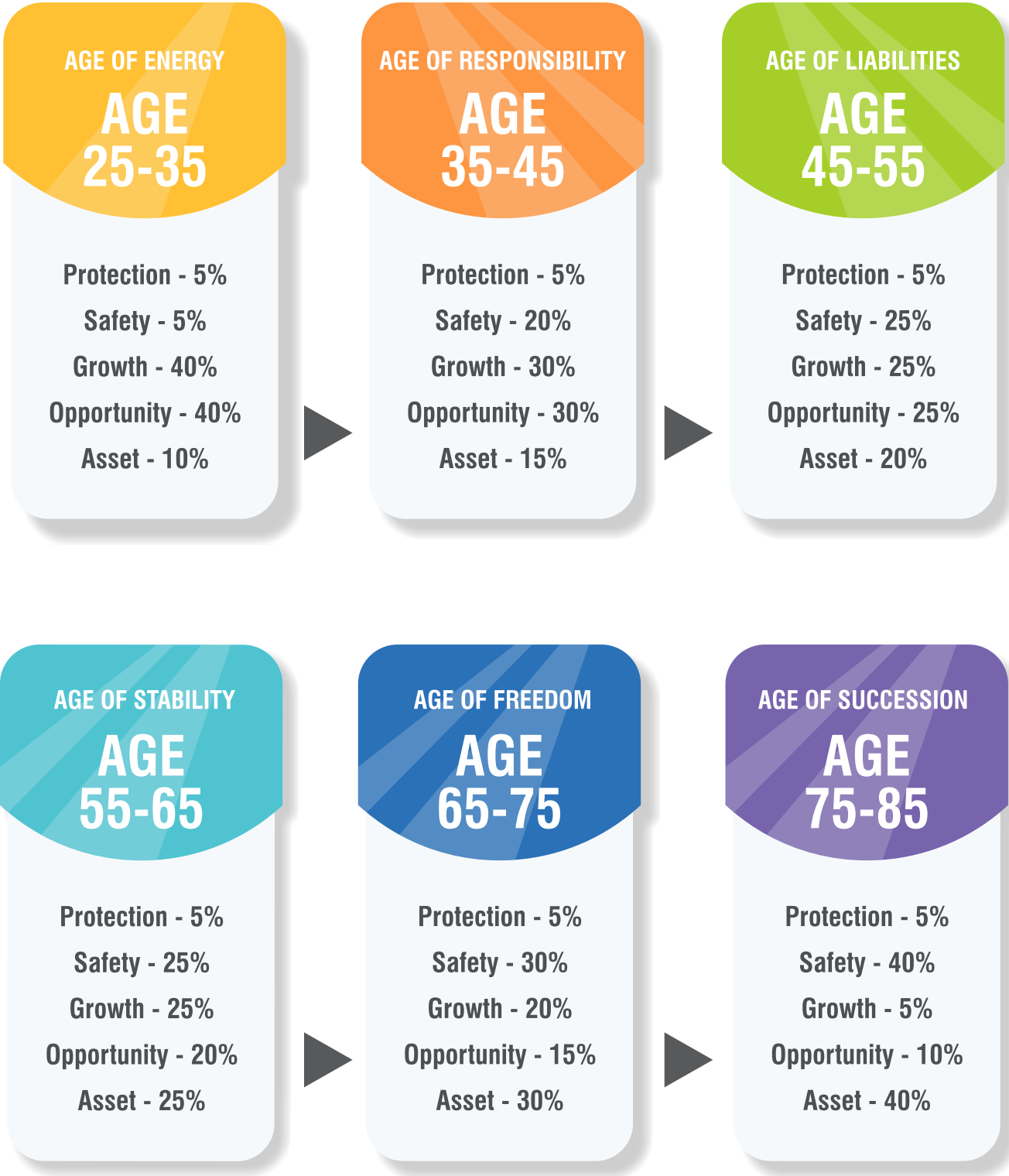
Real Sutra of Financial Freedom lies in .....Restructuring our Portfolio asset allocations as we complete each decade of our life journey ! It will ensure we accomplish all our dreams !

PHILOSOPHY

RETURN ON INVESTMENT RATE  
=  
GDP + INFLATION

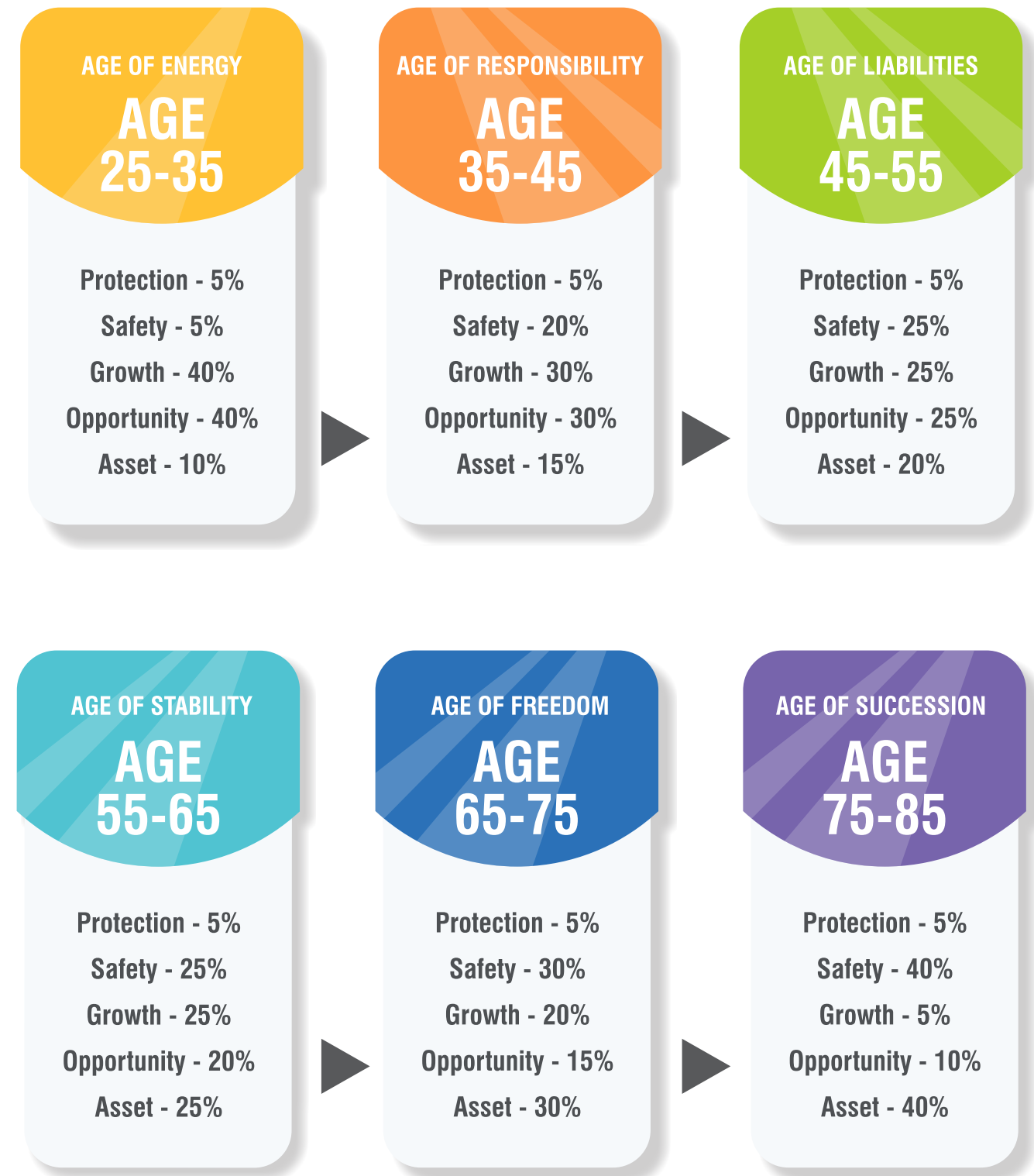
If we follow this ideology being an Indian resident, our expected ROI on the investments should be around 12% pa.

Consistent review & timely asset allocation, this unique combination is the key to make our money Rich!





**BUILD YOUR  
DREAMS WITH US**



WE OFFER



WELCOME TO THE WORLD OF  
**OF FINANCIAL FREEDOM**



MILESTONES

I & I Consultancy  
incorporated....  
Our First Step in  
Financial Planning  
& Money  
Management  
Industry  
**2001**

**2003**  
Equipped with  
almost all  
Insurance &  
Investment  
Advisory  
Services..Ready for  
take off...

Acquired a 300 sq  
feet office in Heart  
of the City,  
Panchpakhadi,  
Thane. Our First  
Business Vastu!  
**2005**

**2008**  
Honour of being  
the youngest MDRT  
from India to  
attend the Canada  
convention!  
Feeling of  
Responsibility!

Reached the mark  
of "1000 Happy  
Families" under I & I  
umbrella. First Kick  
of Ownership!!  
**2010**

**2012**  
Associated with  
World's Largest  
Business Networking  
Organisation.." BNI ",  
Transformation of Life  
begins here....

First Franchisee  
enrolled under I&I  
banner !  
Implementing what  
we learned....."  
'Givers Gain "  
**2013**

**2014**  
Marked our First  
International  
Presence.....Dubai,  
UAE. Time to spread  
our wings.....our  
Global Business  
Footprints!

Inaugurated our  
First Corporate  
Office in Thane  
One Business Park.  
Our leap into  
Corporate world !!  
**2016**

**2017**  
First merger....I&I  
decided to merge  
with SNS & Kshiteej  
Investments and  
become a Private  
Limited Co. ! I&I  
Financial Services  
Pvt. Ltd is born !!!

Opportunity to  
serve the country  
as the President of  
HIRT India ! Yet  
another Feather in  
our Cap !!!  
**2017**

**2018**  
Felicitated with  
one of the most  
prestigious club  
membership of  
Star Health,  
Chairmen Club  
Member !!!

Collabrated with  
Pyramid Properties,  
Thailand for  
International  
Residential &  
Commercial  
Properties.  
**2018**

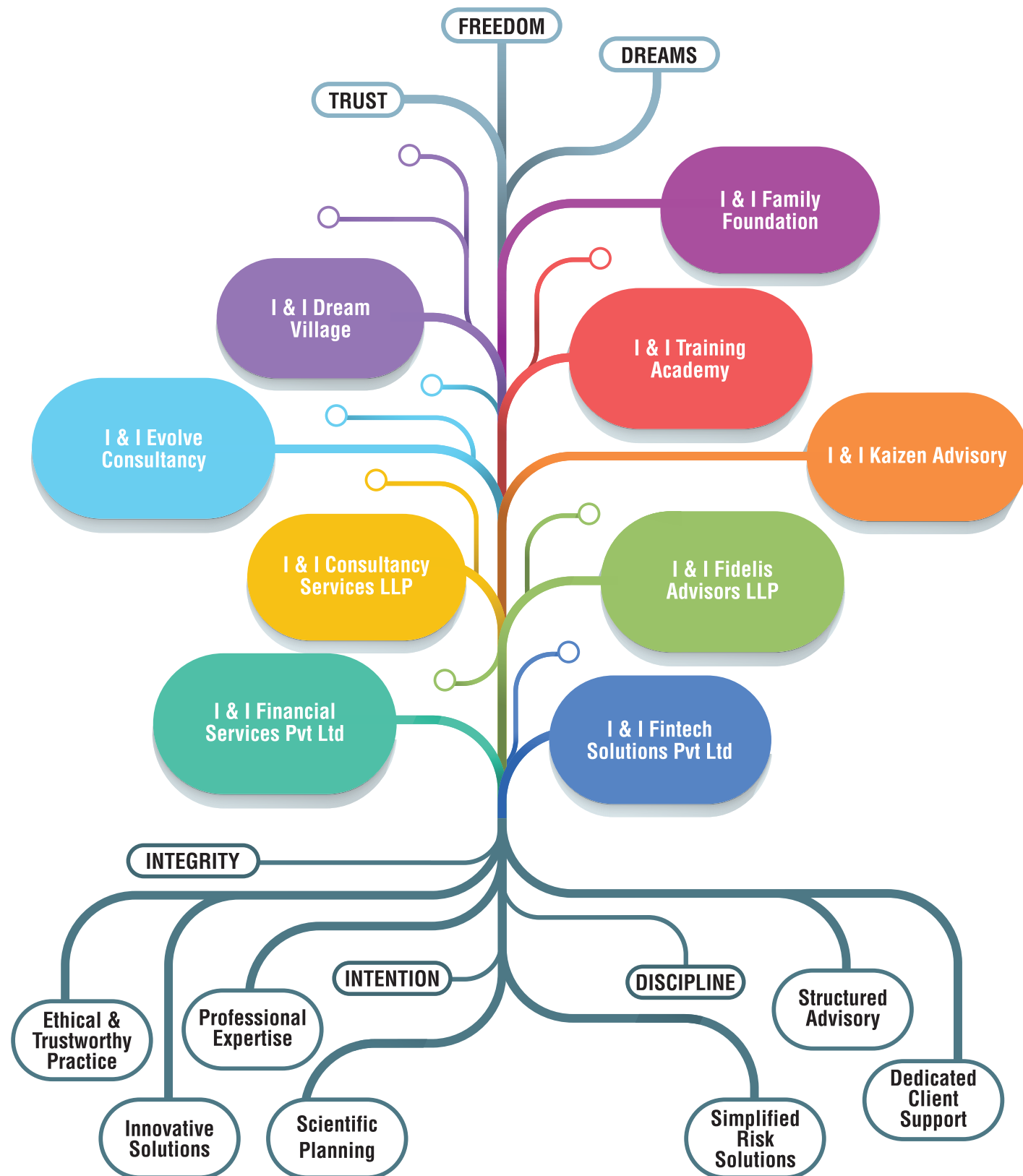
**2019**  
Launching our First  
International  
Regulated Hedge  
Fund & Cooperative  
Digital Wallet!  
Technology at its  
Best!!!

Completed more  
than 350 Speaking  
Engagements across  
the Globe & now  
creating our social  
media presence thru  
YouTube channel  
" I & I Talk "  
**2019**

**2019**  
Sowed our First  
seed as  
developers in  
Real Estate..  
I & I Dream  
Village

WE EAT WHAT  
WE CAN COOK

## I&I TREE



### CORPORATE OFFICE

I & I Financial Services Pvt. Ltd.  
Thane One, 801, DIL Complex,  
Behind Cinewonder, Kapurbawdi,  
Ghodbunder Road, Thane (w) 400610  
Maharashtra, India

### BOARDLINE NUMBER

(+91) 22-61319333

### WEBSITE

[www.inifinance.com](http://www.inifinance.com)

### INDIA BRANCHES

THANE | MUMBAI | NAVI MUMBAI  
PUNE | KONKAN | MARATHWADA  
KOLHAPUR | BANGLORE

### GLOBAL BRANCHES

DUBAI | THAILAND





YOU ARE THE REASON  
WE STAND STRONG