





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

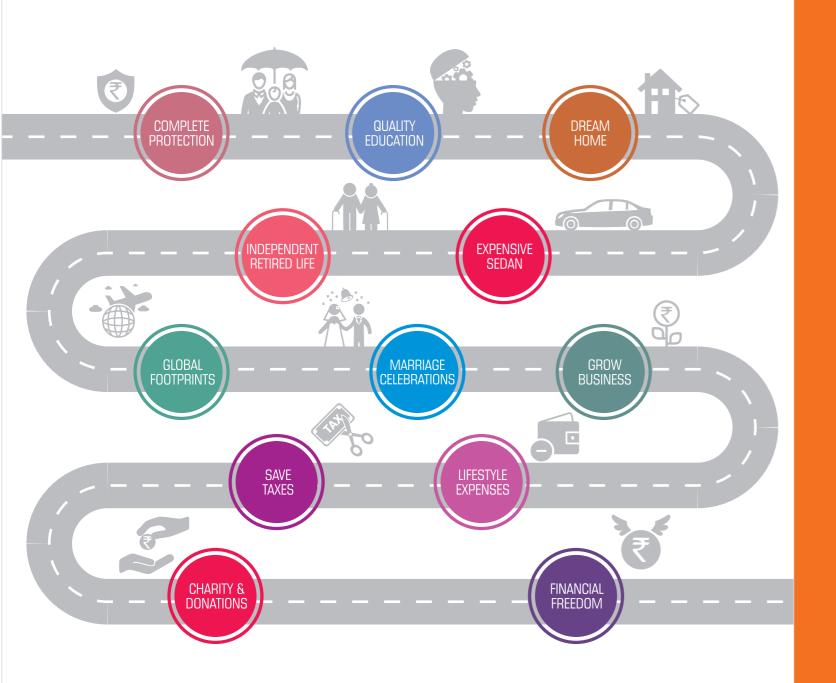
1,000 Cr. Assets Under Management

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 inRestructuring 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!

AGE OF ENERGY

AGE 25-35

Protection - 5%

Safety - 5%

Growth - 40%

Opportunity - 40%

Asset - 10%

AGE OF RESPONSIBILITY

AGE 35-45

Protection - 5%

Safety - 20%

Growth - 30%

Opportunity - 30%

Asset - 15%

AGE OF LIABILITIES

AGE 45-55

Protection - 5%

Safety - 25%

Growth - 25%

Opportunity - 25%

Asset - 20%

AGE OF STABILITY

AGE 55-65

Protection - 5%

Safety - 25%

Growth - 25%

Opportunity - 20%

Asset - 25%

AGE OF FREEDOM

AGE 65-75

Protection - 5%

Safety - 30%

Growth - 20%

Opportunity - 15%

Asset - 30%

AGE OF SUCCESSION

AGE 75-85

Protection - 5%

Safety - 40%

Growth - 5%

Opportunity - 10%

Asset - 40%



BUILD YOUR
DREAMS WITH US

AGE OF ENERGY

AGE 25-35

Protection - 5%

Safety - 5%

Growth - 40%

Opportunity - 40%

Asset - 10%

AGE OF RESPONSIBILITY

AGE 35-45

Protection - 5%

Safety - 20%

Growth - 30%

Opportunity - 30%

Asset - 15%

AGE OF LIABILITIES

AGE 45-55

Protection - 5%

Safety - 25%

Growth - 25%

Opportunity - 25%

Asset - 20%

AGE OF STABILITY

AGE 55-65

Protection - 5%

Safety - 25%

Growth - 25%

Opportunity - 20%

Asset - 25%

AGE OF FREEDOM

AGE 65-75

Protection - 5%

Safety - 30%

Growth - 20%

Opportunity - 15%

Asset - 30%

AGE OF SUCCESSION

AGE 75-85

Protection - 5%

Safety - 40%

Growth - 5%

Opportunity - 10%

Asset - 40%

WE OFFER

HAPPY FAMILY PROJECT

Financial Planning Succession Planning Tax Consultancy Services



PROTECTION

Deriv Inte

ACTIVE MANAGEMENT

Equity & Mutual Funds Derivative Advisory Services International Hedge Fund



DEBT MANAGEMENT

Co-operative Deposits
Company Deposits
Bonds & Debentures



ASSETS

A

TRAINING & DEVELOPMENT

Financial Freedom Workshop Equity & Derivatives Coaching Business Consulting Services







RISK MANAGEMENT

Life Insurance Health Insurance General Insurance



GROWTH



OPPORTUNITIES

WEALTH MAXIMISER

Passive Income Advisory
Credit Management Consultancy
Private Equity & Venture Capital





REAL ESTATE

International Properties
Residential & Commercial Projects
Digital Assets



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 offf...

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

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 "

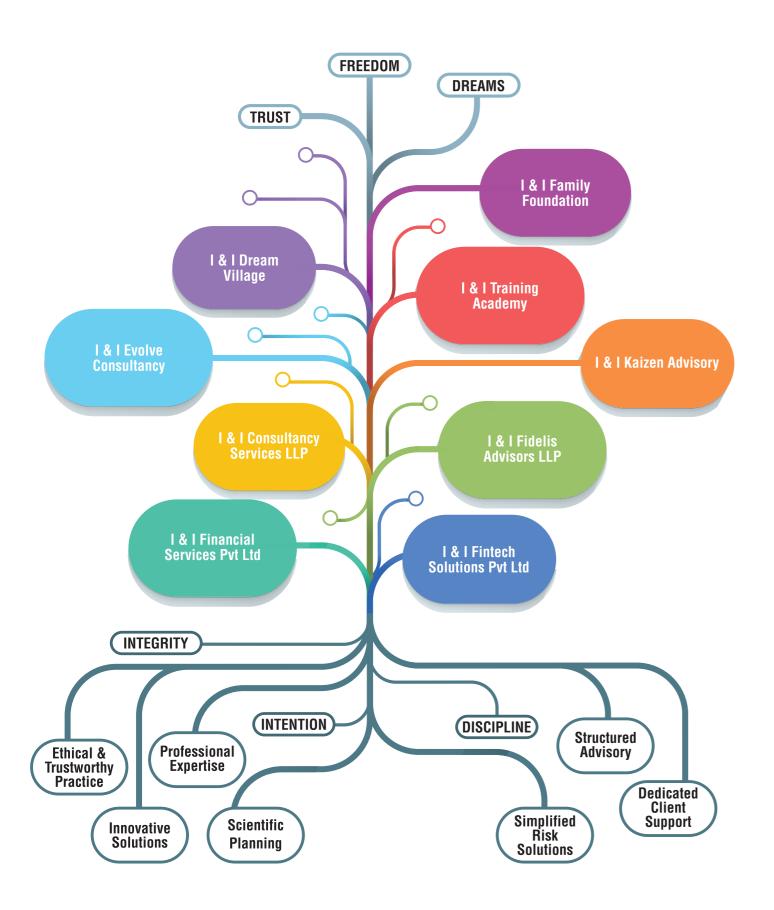
2019

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

INDIA BRANCHES

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

GLOBAL BRANCHES

DUBAI I THAILAND



YOU ARE THE REASON
WE STAND STRONG