FP360

Let's plan your financial freedom
What is a good life? One that is counted by years, or one that is filled with milestones, dreams and experiences? Life becomes better when you have enough money to achieve financial freedom. This requires careful planning and precise execution to ensure your wealth grows.

Financial Planning is an art form mastered by few. While you work hard to earn money, you need an expert with special skillsets to ensure your money works hard for you. We, at IIFL Securities, get some of the best financial planners to work in sync with you to give you the freedom to dream.
A unique approach to investing

IIFL Securities offers you its expertise in financial planning to help you grow your financial assets. IIFL’s unique 360° approach takes a holistic view of your finances and guides you on every step of your journey.

- Takes a 360° approach to finances
- An integrated advisory platform for all financial requirements
- Customized model portfolio approach
- Transparency in charges

All these brought to you in a single offering-

Financial Plan 360°
FP360°
is custom designed for you, with no hidden cost

Under FP360°, all products and services revolve around you and your unique needs. We understand different people have different aspirations. That’s why, we have an array of plans which you can choose from.

No matter which plan you choose, FP 360° makes financial planning very easy on the pocket - no separate brokerage or distribution charges and no Demat AMC. We only charge only a fixed percentage of applicable advisory fees linked to size of assets within regulatory limits.
Why IIFL SECURITIES

Strong Pedigree
Over two decades of helping people achieve their dreams and aspirations

Best in Class Research
Best research minds with sharp analytical acumen to help you make optimal decisions

Corporate Governance
SEBI registered Investment Advisors with highest standards of corporate governance

Open architecture
Going beyond in-house products to offer unbiased solution.

Relationship first
On ground support to solve your queries instantly.

Technology
State of the art integrated platform to provide all financial solutions at one place
Financial Plan 360° is a unique all-integrated platform designed by financial experts. Aided by next-gen technology and disruptive research-backed products, we chart a dynamic financial plan for you. We also understand your diverse dreams need diverse products, that's why we offer:

**What do you get with FP360°?**

- Investment Planning
- Portfolio & Statement Analysis
- Portfolio Recommendation
- Annual Review of Financial Plan
- Access to research & reports
- Invite to knowledge seminar by industry experts
- Private equity & venture capital funds
- Advisory on real estate
- Goal Based Financial Planning
- Insurance Planning
- Tax Planning
- Will & Estate Planning
- Liability Management
- Other financial solutions
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...and more.
Keeping in mind your varied aspirations, our financial planners apply a perfect blend of global knowledge and local insights while planning your finances.

**Benefit from a systematic planning process**

**UNDERSTAND**
Our 360° approach starts with YOU at the center. We start by analyzing your existing investments, income, expense, assets, liabilities, life cycle, net worth, financial goals, risk appetite etc.

**DESIGN**
Then, we make a comprehensive financial plan optimising all the aspects of personal finance with unbiased product selection – customised and keeping in view your risk profile, investment objective and preference.

**EXECUTE**
Seamless execution of the financial plan through our integrated technology platform at lowest cost.

**REVIEW**
Monitoring and reviewing regularly to ensure you are on track to achieve your financial goals including evaluating portfolio performance, benchmarking and portfolio analytics.
A financial planner will design a robust & sustainable financial plan based on your risk profile, help you optimally manage your assets, investments and borrowings and regularly review the financial plan and portfolio. This process requires the planner to tap into expertise of a team comprising analysts, product experts, investment planner and risk officer. When done properly, the process will ensure that your returns adjusted for risk, are highest.
Start with a free no-obligation portfolio checkup

We believe that a better tomorrow begins today. That’s why, IIFL Securities offers a ‘No obligation — free financial health check-up’ on your existing portfolio so you don’t have to postpone planning your finances.

Simply send an email to fp360@iifl.com or visit our website www.indiainfoleine.com/fp360.
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All investments are subject to market risks and price fluctuation risk and there is no assurance or guarantee that the investment objectives shall be achieved. IIFL does not guarantee any assured returns on any investments. IIFL gives investment advice to the clients based on the risk profile and which is best suited to the client. The client has right to decide whether to opt for the products which are advised under these services. The Investment ideas/advice are provided by our core Investment Advisory team based on the Research, Analysis and Publicly available information.

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Investment in securities market are subject to market risks, read all the related documents carefully before investing. Please read the Risk Disclosure Documents carefully before investing in Equity Shares, Derivatives, Mutual fund or other instruments traded on the Stock Exchanges.

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IIFL group, associate and subsidiary companies are engaged in providing various financial services and for the said services (including the service for acquiring and sourcing the units of the fund) may earn fees or remuneration in form of arranger fees, referral fees, advisory fees, management fees, trustee fees, Commission, brokerage, transaction charges, underwriting charges, issue management fees and other fees.