



Foundation **Wealth** Capital Avenues



Managing Wealth for Generations

About Us

FWCA Team is a comprehensive Financial Services organisation, committed to help clients pursue their financial goals & objectives. We offer a wide range of financial products & services to individuals, business owners, companies, trusts & societies etc. FWCA is registered with Association of Mutual Funds of India (AMFI), driven by an entirely investor-centric approach.

Our Products & Services

Investment Products



- ✓ FDs, Bonds, Debentures, Corporate FDs
- ✓ Mutual Funds / Global Funds
- ✓ Equity Stocks & Unlisted Equity
- ✓ PMS, AIFs & Structured Products
- ✓ Secondary Bonds
- ✓ NPS (National Pension Scheme) etc.

Protection Services



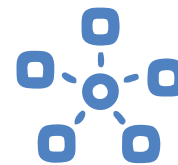
- ✓ Life Insurance
- ✓ Health Insurance / Mediclaim
- ✓ Motor Insurance
- ✓ Building/Factory/Fire Insurance etc.

Lending Solutions



- ✓ Home loan, LAP - Loan against Property
- ✓ Business loan, Personal loan
- ✓ LAS - Loan against securities/ etc.
- ✓ Other Secured and Unsecured loans
- ✓ Special Loans for Professionals

Other Related Services



- ✓ Investment Data Mgt.
- ✓ NRI services
- ✓ Real Estate services
- ✓ Will writing services
- ✓ Estate planning & Trust services
- ✓ Tax Management services

Life Stages of Wealth

ACCUMULATION



20- 50 years of Age

Grow your wealth

PRESERVATION



50- 70 years of Age

Protect your wealth

TRANSMISSION



70 > years of Age

Transfer your wealth

Scientific Techniques / Process

BETA

**Standard
deviation**

Alpha

**SHARPE
RATIO** *Treynor
RATIO*



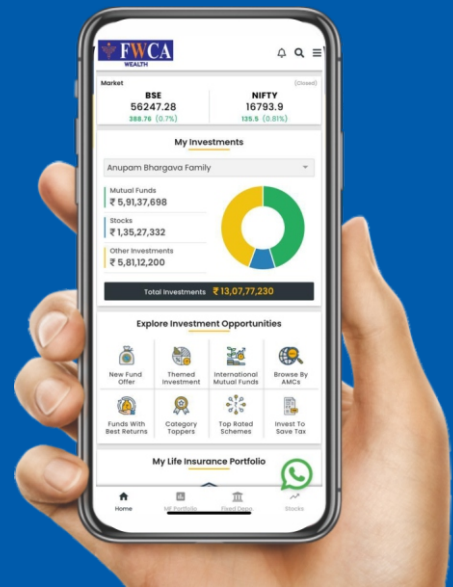
Challenges Faced By Investors:-

1. Mis-Selling, unwanted complex product push like ULIPs.
2. No focus on Asset Allocation & Improper Guidance.
3. RM continuity is not there
4. Online Portfolio / Transaction facility is not available.
5. Lack of Consolidated Portfolio, Capital Gain Statement, Taxation reports etc.
6. Exotic Products & Unknown Risks.
7. Information Overload & Complex Documentation.
8. Limited Capital & Over-Diversification.
9. Bad Timing strategies & Lack of Transparency.
10. Lack of Personalized Customer Services & Advisory services

FWCA Solutions:-

1. Honesty & Transparency is the best policy
2. We follow Scientific Techniques & Process
3. Proper Asset Allocation is the key to success
4. Personalized & Dedicated Customer Service Manager
5. Multilevel point contact for any query or help
6. Web view & Mob. App. available for portfolio reporting
7. Online & Offline transactions, both options are available
8. Regular Portfolio Review & Reporting
9. All Financial Products & related Services under one roof
10. Financial Education system for our clients

FWCA - Mobile Application & Website



Download from
Android Playstore or Apple store



- ✓ Web login from anywhere
- ✓ One time login credential & password protected
- ✓ All kind of Portfolio Reports are available updated as on date
- ✓ Taxation Report & Gain/Loss Report
- ✓ Easy to download in Excel and PDF format
- ✓ All kind of online transactions are available like INVEST, SWITCH & REDEEM



CSR Initiatives

FWCA has strived to build positive bridges with communities that benefits public at large. We see CSR as an opportunity to use our skills, expertise, knowledge and relationships to make a positive difference to individuals, society and the environment. We also make a difference through active involvement in our communities. Our community programmes focus mainly on education and entrepreneurship.



Happy faces from a district school in Nutanhat, West Bengal. One of FWCA's CSR initiatives.

For more info please contact us : **FWCA LLP**
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Disclaimer: All statements made in this brochure by FWCA are for information purposes only. Investors should acquaint themselves with relevant laws and tax implications before making investments. Investment losses may occur from time to time. Economic and market conditions may also lead to non-achievement of investment objectives. FWCA assumes no liability for any losses or damage to potential investors.

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