



Life N Legacy Financials

Your Financial Partner



+919081411173



What we do?

We are currently providing Goal Based Planning, Risk Management Solutions, Insurance Planning, Tax Planning, Wealth Creation ideas & Retirement Solutions to a number of Service Class People & Professional's like MBA'S, Businessmen, Entrepreneurs, Software Engineers, Advocates, Architects, CEO'S, CFO'S etc.

The Role Of Accountability

An interesting observation that I've made over the years is that those who hire a financial planner seem to accomplish more than those who choose not to delegate it.

1. More Action Oriented
2. Avoid more Pitfalls and Mistakes
3. Clearer Vision



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OUR SERVICES : WORK WITH OUR EXPERTS



Sampoorna Suraksha Plan

It Includes :



- Life Insurance
- Health Insurance
- Accidental Insurance
- Home Insurance
- Vehicle Insurance

Investment Planning

It Includes :



- Investment Risk Profile Assessment
- Designing Investment Policy
- Existing Investment Analysis
- Investment Portfolio Setup
- Monthly Portfolio Reports
- Half Yearly Portfolio Review & Advice



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OUR SERVICES : WORK WITH OUR EXPERTS



Comprehensive Financial Planning

It Includes :



- Organized Finances
- Improved & Predictable Cash Flows
- Lower Personal Income Tax
- Well defined Financial Life Goals
- Appropriate & Adequate Insurance Coverage
- Improved Investments Performances
- Lower Investment Risk
- Lower or Debt Free Life
- Planning for all the Goals
- Smooth and Cost Effective Estate Settlement



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OTHER SERVICES :



1. Child Education Planning
2. Child Wedding Planning
3. Retirement Planning
4. Tax Planning
5. Dream House
6. Custom Goal Planning



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WHAT OUR CLIENTS SAY:



Mr. Raja and Life N Legacy Financials are synonym of Financial Planning for me. Whenever I think of increasing my investments, I think of Life N Legacy. Best in class service provider with helpful, courteous and well trained and well behaved Staff

Sajid Bhawra
Senior Financial
Associate, JP
Morgan.

Mr. Raja & Life N Legacy Financials has been for me one of the most helpful and knowledgeable financial advisor since many years. He and his firm not only helped me but also hundreds of people with their expertise financial advisors by offering a friendly and one to one service which released my financial stress.

Dr. Radha
Profession: Doctor, MD.



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CONTACT US



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Click to WhatsApp



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