



# Mini Office



**FinaArray**<sup>®</sup>

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



## Problems in Day-to-Day Financial Management



### Lack of Awareness

Despite family heads making investments, the entire family often remains unaware of their financial products' details and benefits, leading to missed opportunities and unclaimed benefits.



### Fragmented Financial Portfolio

Managing diverse investments, insurance policies, and other financial products lead to a fragmented financial portfolio and difficulty in gaining a holistic view of one's financial standing.



### Time-Consuming Processes

Traditional financial processes require multiple visits to Financial Institutions, consuming significant time.



### Difficulty in Claiming Benefits

Individuals often struggle to understand financial products, leading to challenges in maximizing their benefits.



### Lack of Personalized Guidance

Many people find it hard to get personalized financial advice, resulting in poor decisions and disorganized portfolios.



MINI OFFICE

# CONCEPT



FinArray's **Mini Office Concept** makes **managing** your investments easy and convenient. We offer **customized financial solutions** and provide personalized advice **right to your doorstep**. FinArray is your **all-in-one financial solution** for your investment needs.

## Solutions Provided by FinArray's Mini Office Concept

### Comprehensive Financial Management

FinArray's Mini Office offers a one-stop solution for all financial needs, including Insurance, Mutual Funds, Physical to Demat, Fund Syndication and other financial products.



### Cutting-Edge Technology

Clients can seamlessly access their financial information through the Mini Office, promoting transparency and efficiency. With our portal and application, you can effortlessly track all your investments.



### Client-Centric Approach

The Mini Office concept is client-centric, offering comprehensive services to build meaningful relationships. FinArray focuses not just on financial products but also on fostering long-term connections.



### Door Step Services

FinArray's Mini Office provides door step financial services, removing traditional barriers to financial management. Clients receive personalized attention and guidance, making financial solutions more accessible.



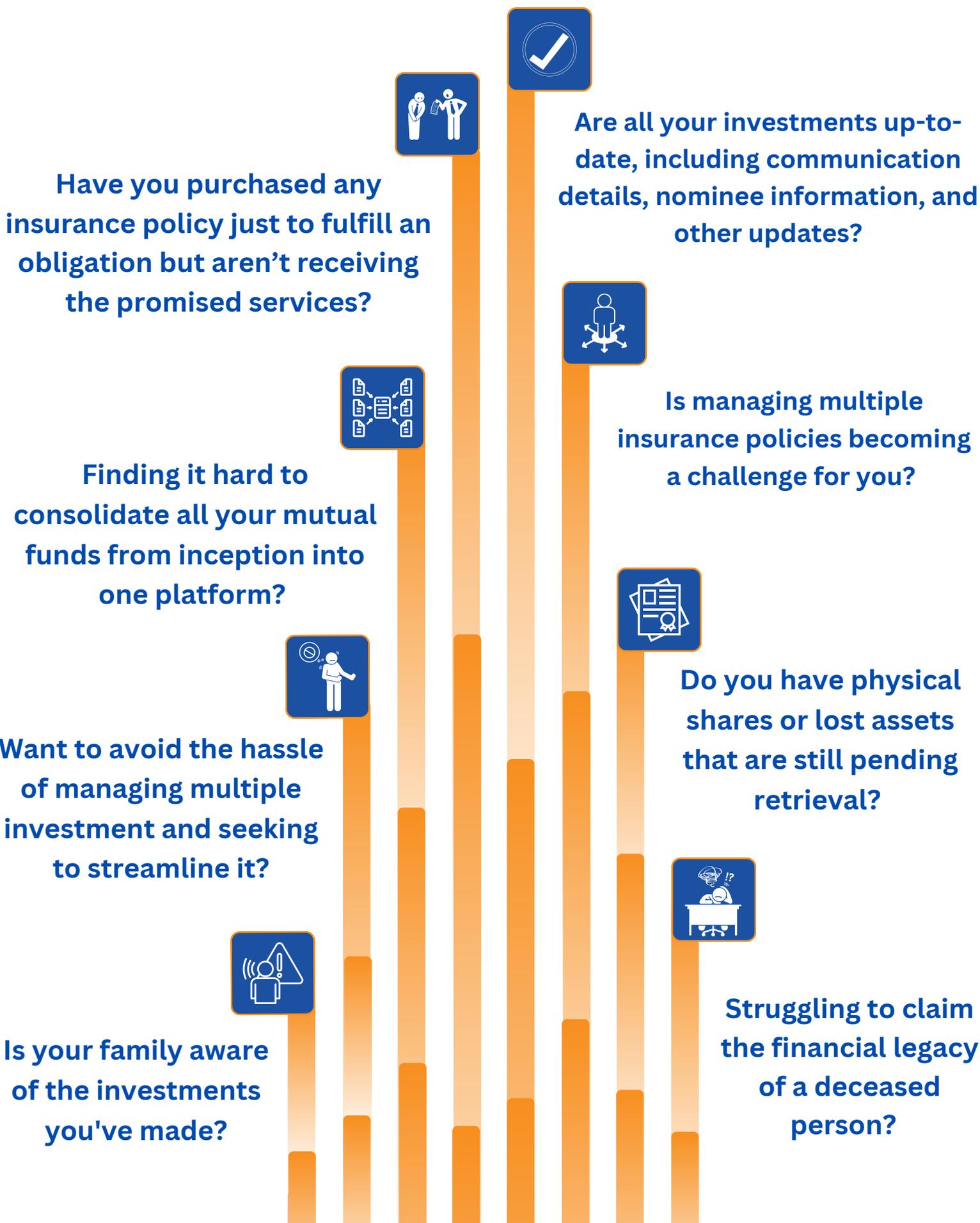
### Inclusive Financial Services

FinArray's Mini Office offers inclusive financial services with tailored solutions, addressing diverse needs and building long-term relationships.



# INVEST WITH INSIGHT :

TURNING CHALLENGES INTO OPPORTUNITIES



# THIS IS HOW OUR COMMITMENT TO YOUR FINANCIAL SUCCESS LOOKS LIKE



Passion, knowledge and a genuine interest in achieving the best for clients is what makes a truly professional Financial Adviser.

The way you found a solution to my very complicated physical share issues is highly appreciated. Please continue this dedication to your customers

I have been in this market for the last 20 years and have met many people, wealth advisors, and their companies, but FinArray stands out as a truly unique company. They are backed by extensive data and, more importantly, they use this data very smartly. I highly recommend that you visit them before making any financial decisions.

Their customer service is top-notch, and they are always available to answer any questions or concerns I have. Overall, I have had a fantastic experience working with Mr. Biren Shah and would highly recommend FinArray to anyone seeking financial management services.

FinArray's Mini Office Concept is a completely groundbreaking and unique concept

It was a pleasure to be associated with you and appreciate to keep us always well informed and updated about our portfolio throughout the duration of the tenure since inception. Thank you for always treating us with respect and kindness.

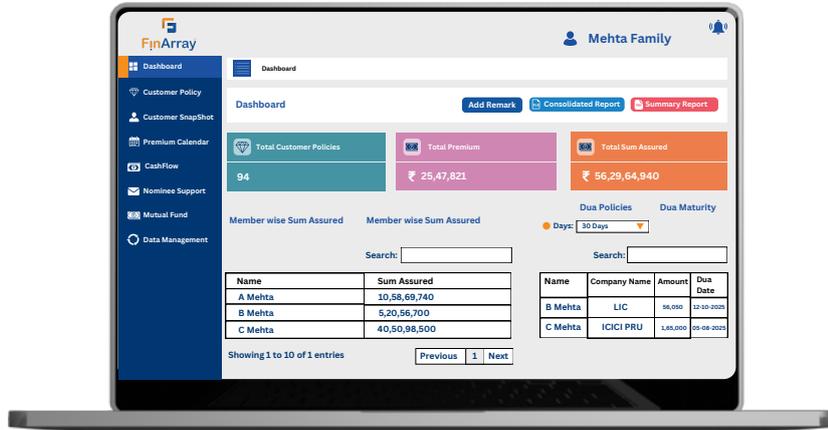
Impressive experience with FinArray. The team is transparent, professional, and responsive. They provided personalized advice aligned with my goals, offering diverse investment options through a user-friendly platform. Their commitment to ethical practices is commendable.

# INSURANCE PORTAL

YOUR FINANCIAL BLUEPRINT CRAFTED WITH CARE



## FinArray: EXPERTLY MANAGING YOUR EXISTING INSURANCE POLICIES



### HOLISTIC REPORTS

Get a holistic 360-degree view of your existing insurance policies, ensuring all details are at your fingertips. Our comprehensive reports offer clear, at-a-glance insights for optimal management.

### POLICY UPDATES

Receive alerts and updates about any changes to your policies like bonus value, fund value, policy loan and more.

### DOCUMENT STORAGE AND ACCESS

Easily access all your insurance related documents at one place. It securely stores your policy kit, Premium Receipt, Bonus and Fund Statement, and Services Request.



### POLICY REMINDERS

Get timely reminders for policy renewals, maturity, and survival benefits. Never miss reminders with our automated notification system.

### CASH FLOW

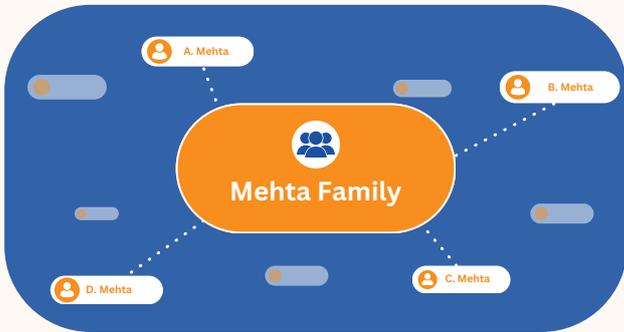
Get an easy-to-understand overview of your cash inflows and the total amount expected at maturity, allowing you to plan your finances ahead of time.

### PERSONALIZED SUPPORT

Get support to address your specific insurance needs and queries. Our dedicated team is here to assist you with any questions or issues.

# INSURANCE PORTAL

OUR SERVICES - AN EAGLE EYE VIEW

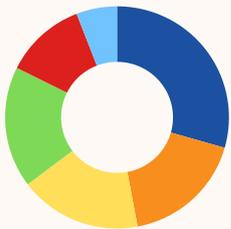
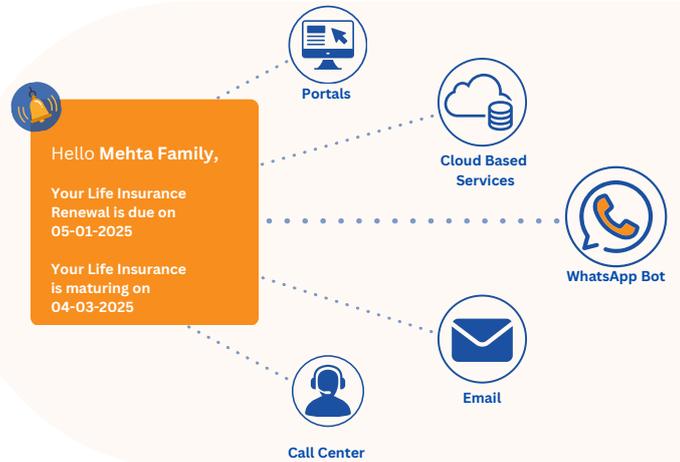


## Comprehensive Overview of your Family's Insurance

With FinArray, effortlessly consolidate all your family's insurance policies into a single, comprehensive dashboard. Simplify management and stay on top of coverage with ease.

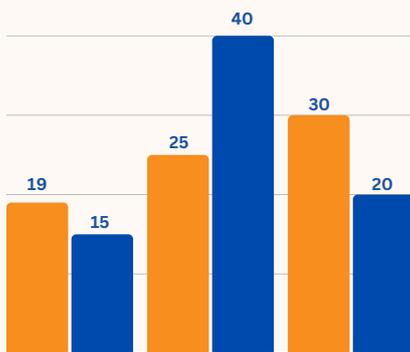
## FinTech Features: All at your Fingertips

Discover the future of insurance with FinArray's portal. Manage everything you need with just a few taps and stay ahead of your insurance needs.



Company wise Policies

- LIC
- TATA AIA
- Max Life
- ICICI Pru
- Edelweiss Life
- HDFC LIFE



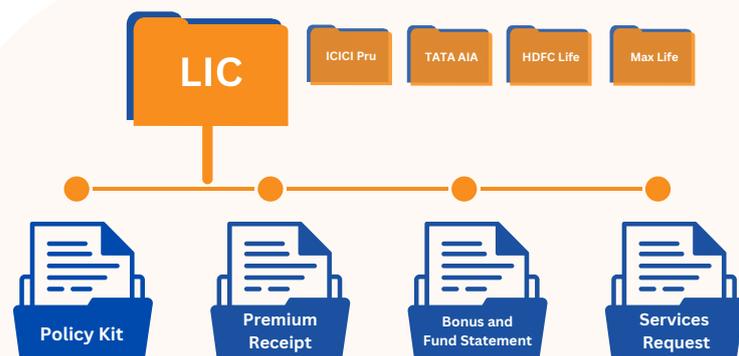
Member wise Policies

## Family Insurance Made Simple: Clear Insights, Smarter Decisions

Get a clear view of your family's insurance with easy-to-read charts. Manage coverage, payments, and premiums effortlessly all in one place.

## Effortless Insurance: All Your Documents, One Secure Place

Streamline your insurance management with FinArray's secure document storage. Access all your policy details anytime, anywhere, without the hassle of paperwork.

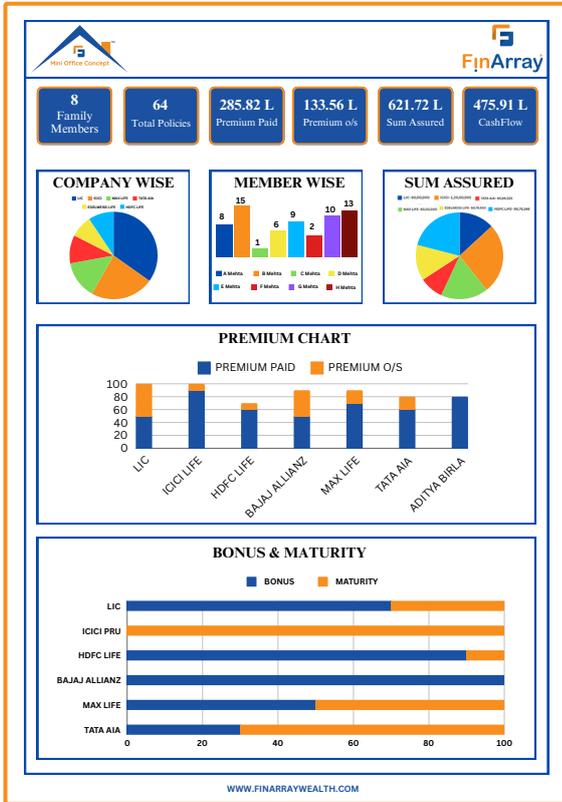


# INSURANCE PORTAL

SUMMARY REPORT, KNOW YOUR POLICY & WHATSAPP BOT



## Summary Report



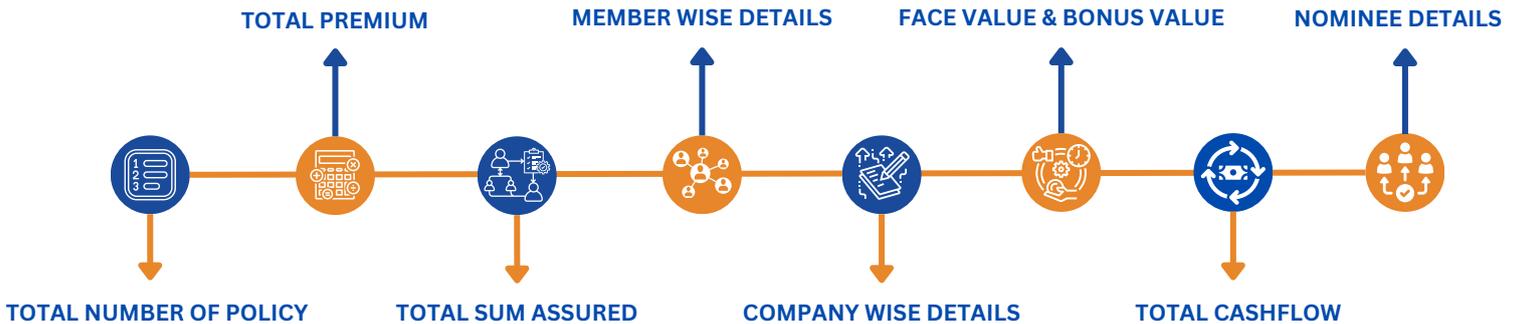
## Know Your Policy

Policy Details	
Company Name	Life Insurance Corporation of India
Plan Name	Jeevan Anand
Proposer	A Mehta
Policy Number	1234567
Life Assured	B Mehta
Date of Com	06-06-2011
Premium Mode	Annual
Premium Amount	500000
Policy Term	20
Premium Paying Term	15
Total Paid	7000000
Liability	500000
Bonus/Fund Value	8500000
Sum Assured	20000000
Status of Policy	Inforce
Plan Type	ULIP Plan
Maturity Date	06-06-2030
Nominee	B Mehta

A wise person should have money in their head, but not in their heart. - Jonathan Swift

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## INSTANT ACCESS TO YOUR NUMBERS ON-DEMAND



## NOW YOUR REPORTS ARE AVAILABLE AT YOUR FINGERTIPS

Download Reports | Maturity Reminder | Service Request | Door step service | Premium Reminder | Quick Quote

# GENERAL INSURANCE:

STAY AHEAD OF THE UNEXPECTED



**FinArray** offers you more than just services -

We provide a complete, eagle-eye view of your insurance. With us, you get personalized attention, smarter protection, and total oversight of your policies, ensuring you stay covered from every angle.



TRAVEL



HEALTH



MOTOR



PERSONAL  
ACCIDENT



GROUP  
POLICY



OTHERS

## BECAUSE WE KNOW YOUR POLICY BETTER....

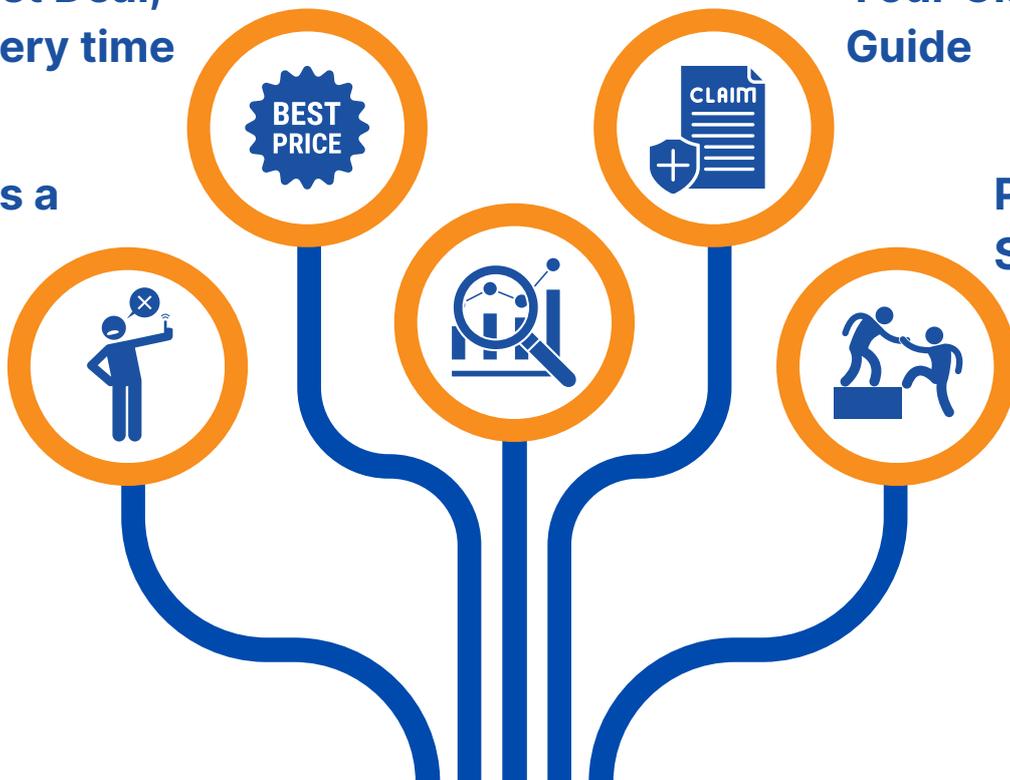
Track with ease

Best Deal,  
Every time

Your Claim  
Guide

Never Miss a  
Renewal

Personalize  
Support

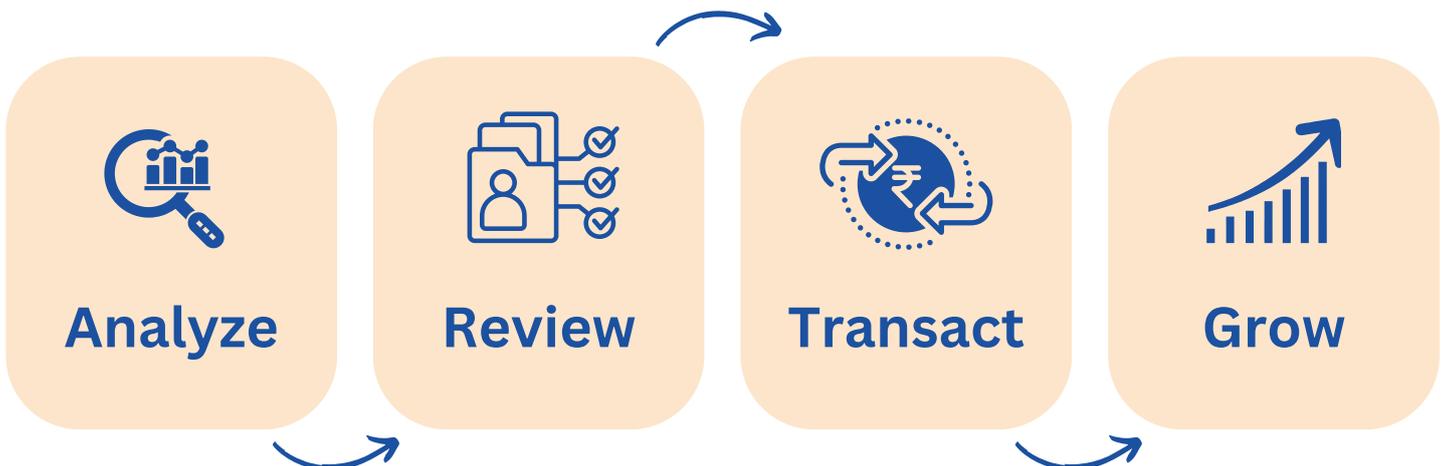


# MUTUAL FUND PORTAL

Rest assured, We will make your Mutual Fund error-free.



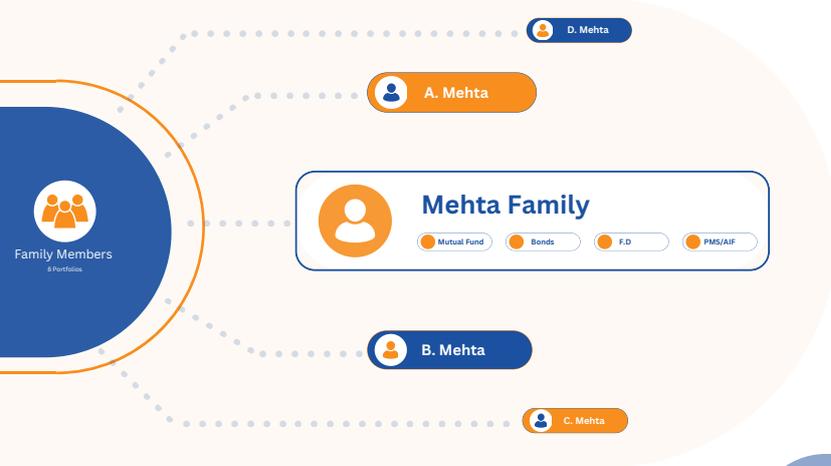
## Efficiently Manage Your Family's Mutual Funds in One Place



MUTUAL FUND INVESTMENTS ARE SUBJECT TO MARKET RISKS, READ ALL SCHEME RELATED DOCUMENTS CAREFULLY.

# MUTUAL FUND PORTAL

OUR SERVICES - AN EAGLE EYE VIEW



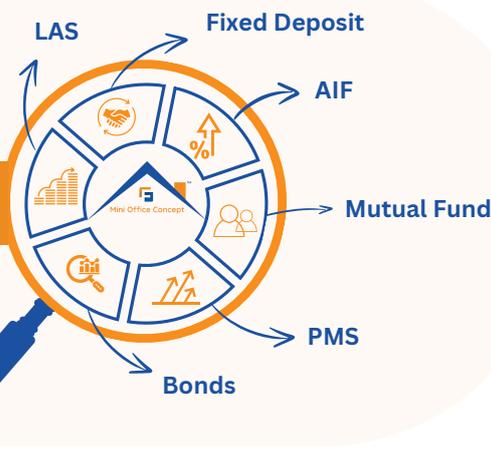
## Unified View of Your Family's Financial Picture

With FinArray, easily bring together your family's entire mutual fund portfolio into one cohesive view.

## In-Depth Portfolio Insights and Analytics

Gain clear visibility into portfolio performance, track Scheme return against indices, and fully understand your asset allocation since inception.

PORTFOLIO XIRR  
25.12 %

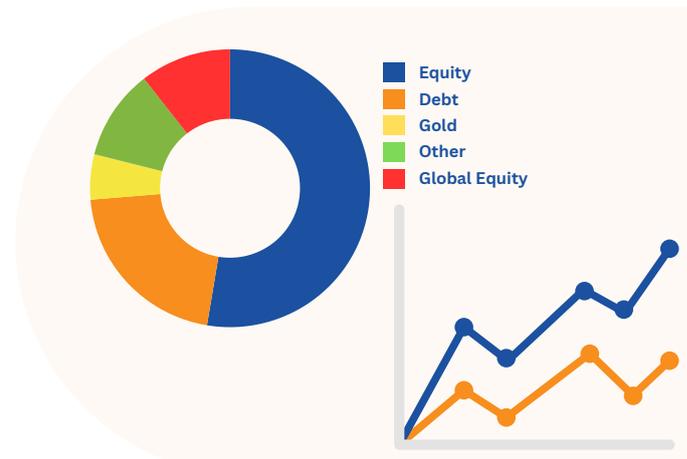


## Effortless data integration through advanced automation

Seamlessly sync your data across financial institutions for all asset classes.

## Customized Reports for Family Financial Insights

Generate reports for Portfolio Valuation, XIRR, Comprehensive Portfolio, Portfolio Screener, Text Reports, and Redemptions Simulation, all customized for your needs.



# PHYSICAL TO DEMAT

SECURE YOUR WEALTH: CONVERT TO DEMAT TODAY!



## ARE YOU SEARCHING FOR...



### IEPF CLAIMS

As per Section 124 (5) of the Companies Act 2013, any dividend lying unpaid and unclaimed with a company for 7 consecutive years is transferred to Investor Education and Protection Fund (IEPF) Authority. FinArray will help you retrieve these unclaimed dividends with ease.



### UNCLAIMED DIVIDEND

Claim shares and dividends from the Investor Education and Protection Fund (IEPF) by submitting requisite documentation and fulfilling eligibility criteria outlined by regulatory authorities. FinArray will guide you through the retrieval process smoothly.



### LOST SHARES

In the early days, investments in shares were done through physical certificates, which were often lost or damaged over time. FinArray is your trusted partner in recovering these lost shares. We provide expert assistance in claiming unclaimed shares, handling share transfers, and addressing related concerns.

## PROCESS FLOW

### RESEARCH AND FIND



INFORMING YOU ABOUT  
YOUR WEALTH



### DOCUMENTATION



MANAGE EVERYTHING ON  
YOUR BEHALF



### CONFIRMATION FROM COMPANY SIDE



CREDIT YOUR WEALTH



# TRANSMISSION

SECURE YOUR LOVED ONE'S LEGACY, FOCUS ON HEALING



Losing a loved one is hard, and dealing with their finances can make it more difficult. At FinArray, we understand your loss and are here to help.

We provide transmission service for all financial assets, such as Mutual Fund, Insurance, Fixed Deposit, Locker, Demat, PPF, NPS, Bank Accounts and Other Financial Investment, to beneficiary name.

Our goal is to make this process as smooth and stress-free as possible. FinArray will complete the entire process for you within **45 days\***



OUR TEAM OF EXPERTS WILL HANDLE ALL THE DETAILS, SO YOU DON'T HAVE TO WORRY.



WE UNDERSTAND HOW IMPORTANT IT IS FOR YOU TO FOCUS ON HEALING DURING THIS DIFFICULT TIME.



TRUST FINARRAY TO PROVIDE THE SUPPORT AND CARE YOU NEED.



LET US TAKE CARE OF THE FINANCIAL SIDE, SO YOU CAN TAKE CARE OF YOURSELF AND YOUR FAMILY.

Professional Assistance

24\*7\*365 Service



Door Stop Solution

Consolidate Information

# FUND SYNDICATION

WHERE VISION MEETS CAPITAL : TRANSFORMING IDEAS INTO FUNDED REALITIES.



Experience seamless financial growth with FinArray's Fund Syndication service, expertly crafted for Manufacturing Companies, Real Estate Developers, Infrastructure Companies, and Trading Companies. Whether you're fueling large-scale projects or securing Working Capital, our tailored solutions provide the financial advice you need to drive success so to ensure smooth & timely project execution in cost effective manner.

## FUND SYNDICATION

We are expertise into arranging various Project and Working Capital Funding from PSU, Private banks, NBFC for your business requirements. Our deep Industry Knowledge and strong banking relationships enable us to secure the best funding solutions to drive your projects forward.

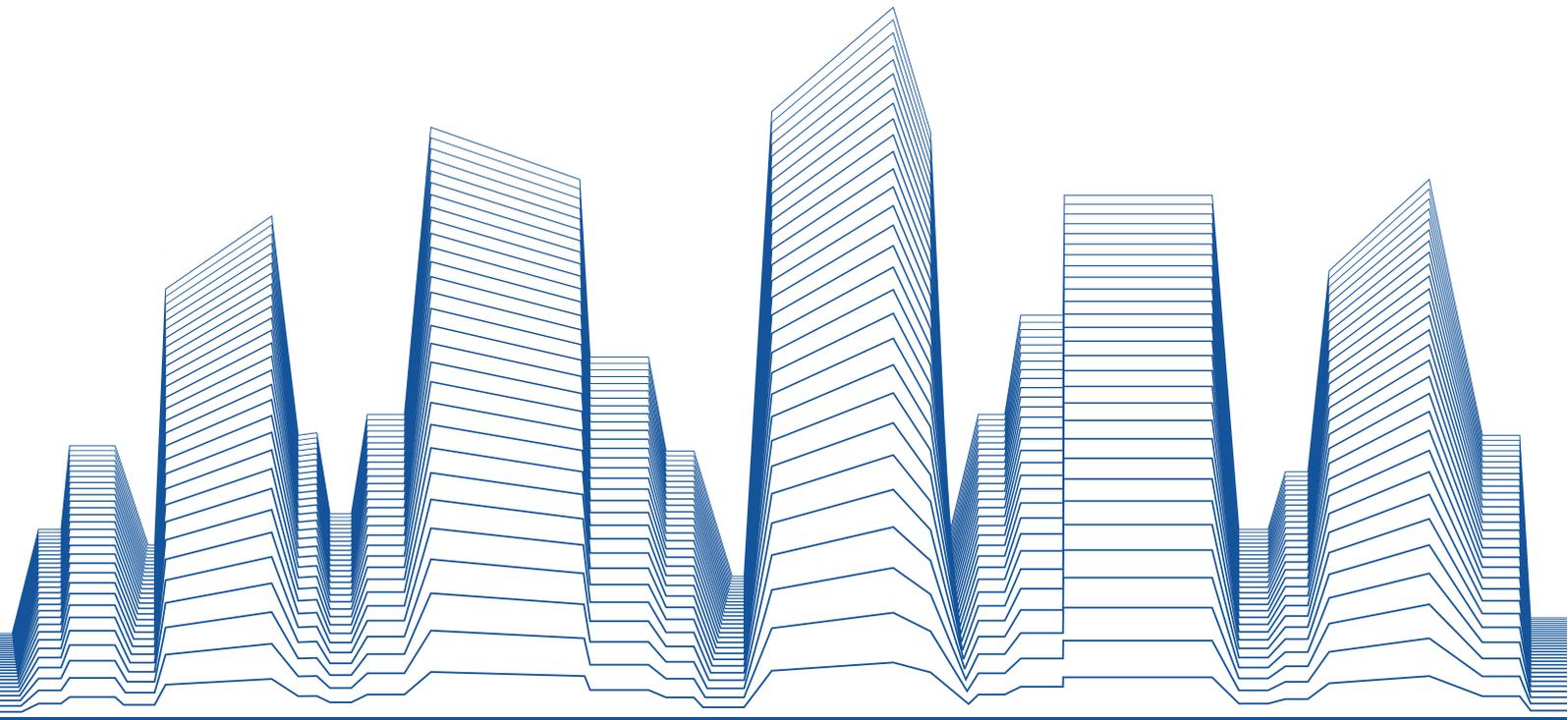
## RETAIL INVESTOR FUNDING

Customized financing solutions for Investment in Residential and Commercial Properties, making Real Estate Ventures seamless and rewarding.

## GOVERNMENT SUBSIDIES

We help businesses access Central and State Government subsidies, exemptions, and concessions for greenfield and brownfield projects, R&D activities, and more. Our services include feasibility analysis, project report preparation, application filing, follow-ups, and coordinating with authorities to secure licenses, approvals, and disbursal claims.

FinArray provides reliable, competitive funding solutions to help you achieve your business goals with confidence.





## Equity Market

At FinArray, we focus on long-term investments that prioritize stability and growth. By harnessing the power of compounding, we help you build wealth steadily over time, avoiding unnecessary risks and complexities.

# 01



## Fixed Income - Bonds

At FinArray, we value the stability in your investment portfolio. Bonds, issued by governments and corporations, offer a dependable option with fixed interest payments and lower volatility, making them ideal for steady, long-term growth.

# 02



## Fixed Deposit

Corporate Fixed Deposits offer stable, predictable returns over fixed periods with flexible maturities. At FinArray, we recommend them for investors seeking both stability and attractive returns in their financial planning.

# 03



## Loan Against Securities (LAS)

Loan Against Securities (LAS) lets you access funds while keeping your investments intact. At FinArray, we offer LAS solutions, providing quick liquidity without liquidating your assets.

# 04



## National Pension System (NPS)

The National Pension System (NPS) provides a secure, tax-efficient way to plan for retirement. At FinArray, we help you utilize NPS to build a solid retirement fund and ensure long-term financial growth.

# 05



## Portfolio Management Service (PMS)

Portfolio Management Services (PMS) offer personalized investment strategies tailored to your financial goals. At FinArray, we provide expert PMS solutions to optimize your portfolio for growth and stability, ensuring your investments align with your objectives.

# 06



## Alternative Investment Fund (AIF)

Alternative Investment Funds (AIF) offer diverse investment opportunities beyond traditional assets. At FinArray, we provide tailored AIF solutions to help you access unique opportunities and enhance portfolio returns with expert guidance.

# 07



FinArray Wealth Private Limited

FinArray IMF Private Limited

FinArray Capital Private Limited

CALL US

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info@finarraywealth.com

LOCATE US

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Cross Rd, Satellite, Ahmedabad,  
Gujarat-380015



AMFI REG NO - ARN-229776 | IMF REG NO - IMF07700320240666

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