

Ultimate 30 mins Cheat Sheet for Strong Wealth Preservation

How to quickly Increase the Protection of Your Assets by **2** to **5x**?

THE STRONG WEALTH PRESERVATION CHECKLIST

“Naikwealth has impressed me with their personalized service, safety angle & Financial Literacy. I have no hesitation in recommending them to anybody looking out for trustworthy financial planners.”

— A Gynecologist
An Investor Since 8 Years

TRACK SPENDING

01

- Identify your spending & you must focus on the tracking your spending, which will help you find the Idle Cash
- Find & Organize past spending ₹ amounts

SET SAVINGS & INVESTMENT GOALS

02

- Articulate your savings & investment goals? How will you accomplish them ? Fulfill them ?
- Set investment goals (10+ years)
- Prioritize Financial goals by needs, wants and wishes

EXPENSE MANAGER

03

- A Powerful Tool that will manage your expenses & keep you stress free.
- <http://gdurl.com/1mNh/download>

RECONCILE SPENDING & GOALS

04

- Check whether your goals are attainable based on your income.
- Review importance of Financial Goal. set your financial goals. Invest according to your Financial Goals.

BUDGET

05

- Consider your Spending habits and make your budget based on your income
- Allocate Non-negotiable budget for your financial Goals. Set aside money for lumpy Expenses.

AUTOMATE

06

- Automate transfers from savings to investment accounts.
- Automation will help you be worry free about your transfers.

ALLOCATE

07

- Allocate your Assets based on your personal objectives & constraints in alignment with your investment goals.
- This is best tool for wealth preservation.

FAMILY SECURITY

08

- Preservation of family is necessary step in wealth preservation.
- Have insurance for the Family & security for the Fully secured Wealth Creation



NAIKWEALTH Planners Pvt. Ltd.

Call +91-9867386236 or email ameya@naikwealth.in to Learn the Ultimate Blueprint of BEING WEALTHY without wasting your valuable time, Become successful in Wealth Preservation & to Leave a legacy for Your Next Generation.

© 2018 Naikwealth Planners Pvt .Ltd. All Rights Reserved.