



Mutual fund distributor

Introduction

- A boutique firm that believes in wealth management as a tool to empower lives.
- Financial Independence is the prime need for life planning followed by financial fitness.
- We work on two philosophies –
 - 'Financial Fitness through Financial Literacy'
 - 'Physical Fitness is Financial Fitness'

Who we are?

We are a father-daughter duo working our way out in financial distribution industry and trying to contagiously spread the idea of 'financial fitness'



Our Mission

Simplify personal finance and investment planning through enabled transparent financial services aiming at financial fitness.

What we offer?

Financial Plans (with our partnering SEBI registered advisors)

Wealth Management Services

Insurance Services – General & Health

IAP – Investment Awareness Program

Investment Desks

Why SBS FIN?

- We are a young team with very experienced founders, so we know just the right thing for you.
- We 'customize'. Our empaneled life planning experts will understand your lifestyle and only then will come with a customized financial plan.
- At SBS '**personalization**' is the key.
- We understand you are 'busy' and that is why we sometimes do not mind stretching a little bit. We are customer friendly and can challenge the best of turnaround time in the industry.
- Our portfolio management services are transparent to the core. We provide anytime access through web & Mobile App
- Our '**Risk Profiling**' and '**Fund Research**' services are technology backed and offer easy software access.

How are we different?

We are super-organized



We come with good 4 decades of experience



Our motto is 'financial fitness for one & all'



We offer robo advisory tools and we believe in technology as the tool for investments



Our only weakness!

We are too organized with our processes and documentation

What's instore for you @SBSFIN?

- Financial Fitness – Assured!
- Your Financial Records in place – Absolutely!
- Investments - @ a click!
- Portfolio Reports @ a click!
- Insurance Solutions for you & your family - just a call/email away!

We Manage!

Personal Portfolios

Family Portfolios

Investment Planning for
Startups, MSMEs and SMEs

Our Clients



Few Good Words...

Passion, knowledge and a genuine interest in achieving the best for clients is what makes a truly professional Financial Fitness Coach. Rashi has this... Her dedication to clients, business excellence and education sets her apart and I would highly recommend her to anyone wanting to achieve better financial outcomes.

– Sarika Prasad, VP-Legal, Kotak Mahindra Bank

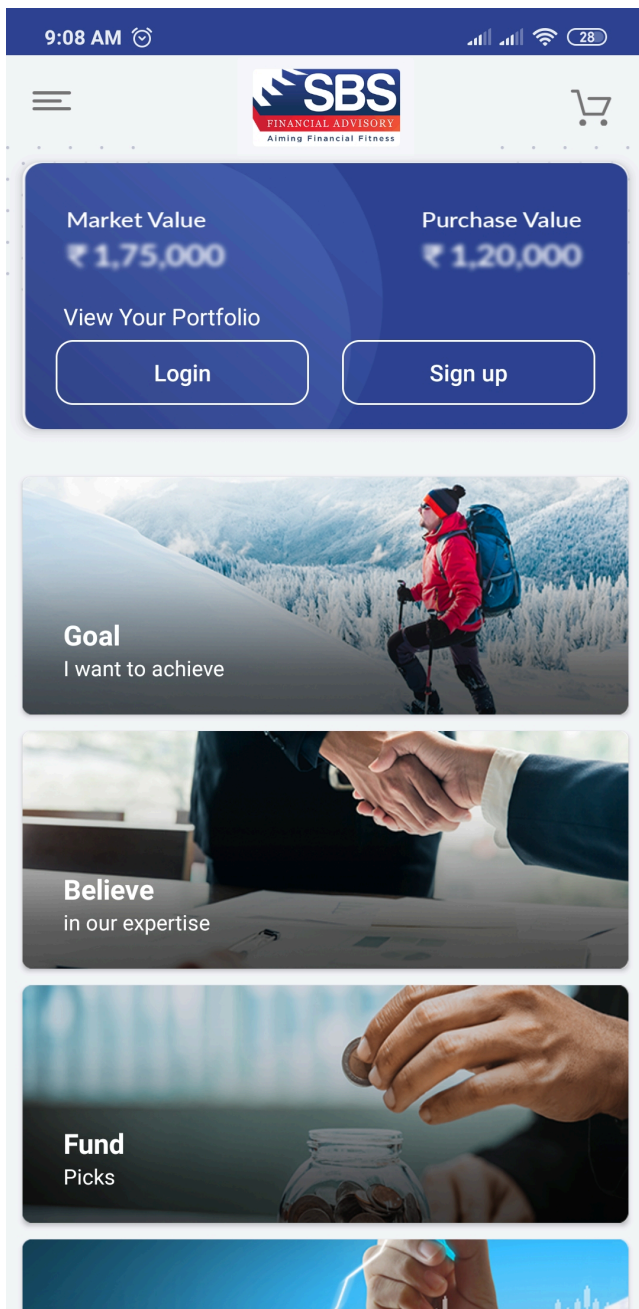
Few Good Words.. .

"I have known Rashi Bhargava for more than a decade , been investing on her recommendations in direct equity since 2007 and with her firm – Step By Step Financial Advisory since its inception. During this period, I have depended on her entirely for any information or advice regarding investing in mutual funds, not only of my own savings, but those of my family members as well. All these years, she has seen to it that my investments have not only grown, but have grown profitably.

This near decade long confidence I have had in Rashi has been because of uncompromising integrity and honesty in her investment advice. Rashi and her firm consider one's overall financial portfolio and create a sustainable investment strategy, which they then adjust based on individual need and macroeconomic situation. The firm is regular in sharing portfolio updates and provides operational convenience to its clients.

I would recommend her firm to one and all – individuals / corporate / HUFs /Entrepreneurs."

– Manmeet Singh Jolly, Director – Jolly Farm Fresh



Got Questions!

Let's meet for a **coffee!**

Write to us at: **contact@sbsfin.com**

Subscribe to our App- **SBS Fin** (available on Google Play & Apple Store)

Looking forward to hearing from you!

Best! Team SBS Fin