



S R FINANCIAL

S E R V I C E S

Your Wealth. Our Expertise. One Roof.

Wealth Management & Financial Planning in Pune · Since July 2020

5+ YEARS

100+ CLIENTS

AMFI REGISTERED

GOAL-BASED ADVICE

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ABOUT US

A Partner for Every Stage of Your Financial Life



S R Financial Services was founded in July 2020 with a simple belief — that every family deserves clear, honest and goal-based financial guidance, without running from one specialist to another.

We bring all seven pillars of your financial life together under one roof: financial planning, investments, insurance, tax, retirement, estate planning and loans. That means a single, trusted advisor who understands your complete situation and plans every decision around your real-life goals. Today we're proud to guide 100+ families across Pune — from young professionals starting their first SIP to retirees planning a lasting legacy.

◆ Our Vision

To be Pune's most trusted financial services partner — the first name families think of for honest, goal-based guidance to build, protect and pass on their wealth.

◆ Our Mission

To simplify financial decisions for every client by delivering all seven wealth services under one roof, with transparency, empathy and disciplined, goal-based planning at the core.

WHY CHOOSE US

Advice You Can Trust



Independent & Unbiased

Advice aligned to your goals, never product-pushed.



All Under One Roof

Seven services, one advisor — no juggling agents.



Transparent & Clear

Plain-language reviews, honest numbers, no surprises.



Goal-Based Approach

Every rupee tied to a real goal with a clear timeline.



Personal Relationship

A dedicated advisor who knows your family's journey.



AMFI Registered

Qualified, compliant and accountable guidance.

WHAT WE DO

Seven Services. One Trusted Roof.



Financial Planning

01

A roadmap to every life goal.

Goal-based planning, budgeting, cash flow, emergency fund & debt management.



Investments

02

Grow wealth with the right mix.

Mutual Funds, PMS, Stocks, Bonds, FDs, Gold, AIF & SIF — matched to your risk profile.



Insurance

03

Protect what matters most.

Life, Health, General & Corporate insurance for your family and business.



Tax Planning

04

Save more. Pay less. Legally.

Tax-saving investments and advisory, integrated with your overall plan.



Retirement Planning

05

Secure a stress-free retirement.

Pension plans, annuities and goal-based investing for lasting income.



Estate & Succession

06

Smooth transfer to the next generation.

Wills, trusts and family wealth-transfer strategies, done with care.



Loan & Credit Advisory

07

Lowest rates with expert guidance.

Home Loan, Loan Against Property (LAP) and Loan Against Securities (LAS) — structured so your borrowing supports your goals.

5+

Years of Service

100+

Families Guided

7

Wealth Services

1

Trusted Roof

GET IN TOUCH

Let's Plan Your Financial Future



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Book a Free Consultation

No jargon, no pressure — just a clear conversation about your goals. Bring your entire financial life under one trusted roof.

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