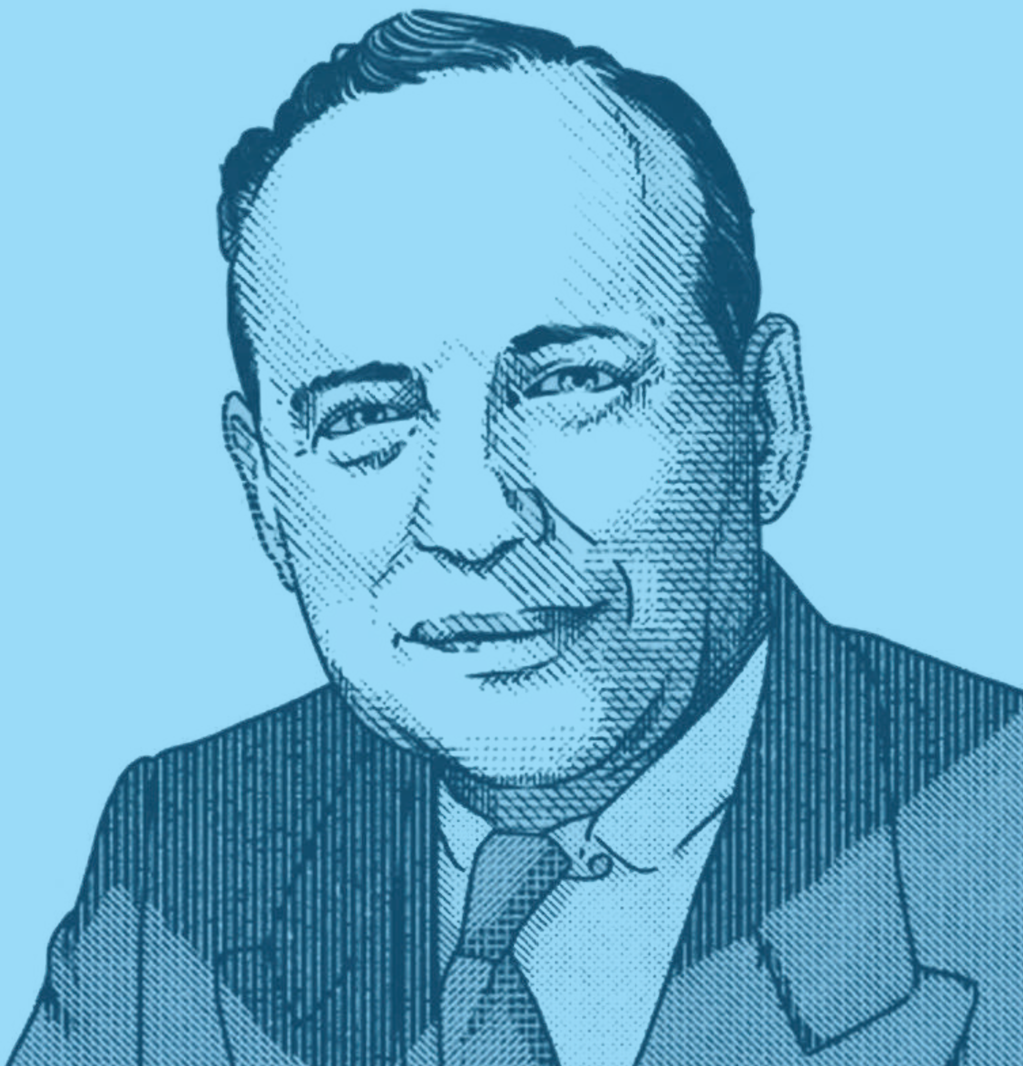
J2 WEALTH

"CULTIVATE
GROW AND,
PROTECT
YOUR WEALTH"

“ The best way to measure your investing success is not by whether you’re beating the market but by whether you’ve put in place a financial plan and a behavioral discipline that are likely to get you where you want to go ”

- Benjamin Graham

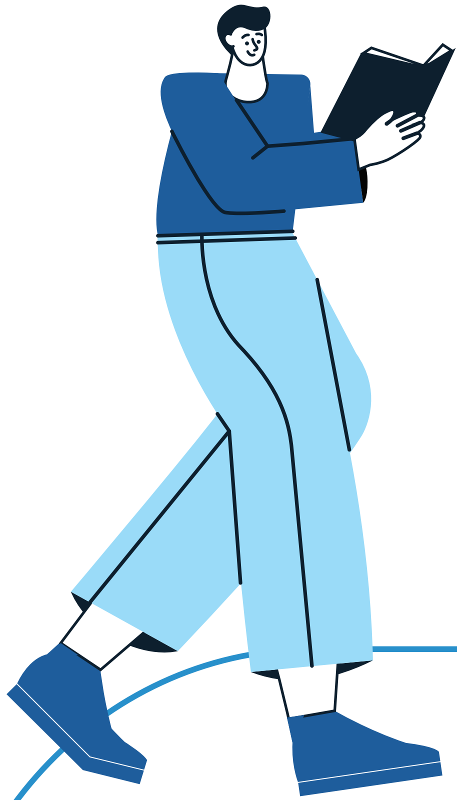


Growing Wealth is not easy
It's a long and hard journey that often sees unexpected twists and turns.
To navigate the journey and come up a winner, you need the right financial coach by your side, who can be your guide for generations.
Enter J2 Wealth.

www.j2wealth.co.in

ABOUT US

J2 Wealth is one of the fastest growing private wealth management firms in India with an AUM around ₹ 1,000 crore*. We serve the highly specialized and sophisticated needs of high net worth and ultra-high net worth individuals, affluent families, family offices and institutional clients through a comprehensive range of tailored wealth management solutions. We foster long-term relationships built on trust, transparency and thought leadership.
J2 Wealth helps more than 1,500 clients in India and abroad to preserve, protect and grow their legacy. A deep understanding of clients results in a comprehensive range of tailored wealth management solutions for the discerning clients.



ABOUT OUR CEO

Mr.Jilani is Founder, MD and CEO of J2 Wealth Pvt Ltd.- Jilani,as a professional entrepreneur set up J2 Wealth in 2019. He has more than 18 years of experience in the financial services industry, across wealth management and direct equity. He is responsible for providing direction and leadership towards the achievement of the organization's strategic goals and objectives. Under his leadership, J2 Wealth has grown from its humble beginnings to becoming the leading Independent Financial Advisor in India managing more than INR 2,000 crore in client assets.

ABOUT OUR BUSINESS HEAD

Mr. Rajasekar, the Business Head at J2 Wealth Private Limited, brings with him over 20 years of extensive industry experience. Throughout his illustrious career, he has excelled in the financial services sector, demonstrating exceptional expertise and delivering outstanding results. With a remarkable track record, Mr. Rajasekar has successfully managing more than 500 clients with an AUM of more than 300 Crores. His previous tenure at Cholamandalam Securities Ltd further enriched his knowledge and honed his skills, positioning him as a seasoned professional in the field. With his wealth of experience and proven success, Mr. Rajasekar plays a pivotal role in driving the growth and success of J2 Wealth, making him a valuable asset to the organization.

YOU DEFINE SUCCESS, WE HELP YOU ACHIEVE IT

With our commitment to partnership, we help guide you through life's uncertainties and strive for success.

Saving for Education

Will I be able to pay for my children's education?

Retirement Planning

Is there a way to plan for retirement that takes my lifestyle, family and company into account?

Maintain Cash Flow

I can predict some expenses, but others I can't. How can I plan to have the cash I need?

Travel Goals

Is my nest egg big enough for my travel dreams? Can we swing that vacation home?

Business Strategies

How do I manage my personal wealth with so much tied up in my company?

Health Needs

What happens to our child's inheritance if one of us needs long-term care?

Investing

I have so many goals and priorities...how can one investment strategy balance them all?

Home Ownership

What is the right financing solution to allow me to pursue my home ownership goals?

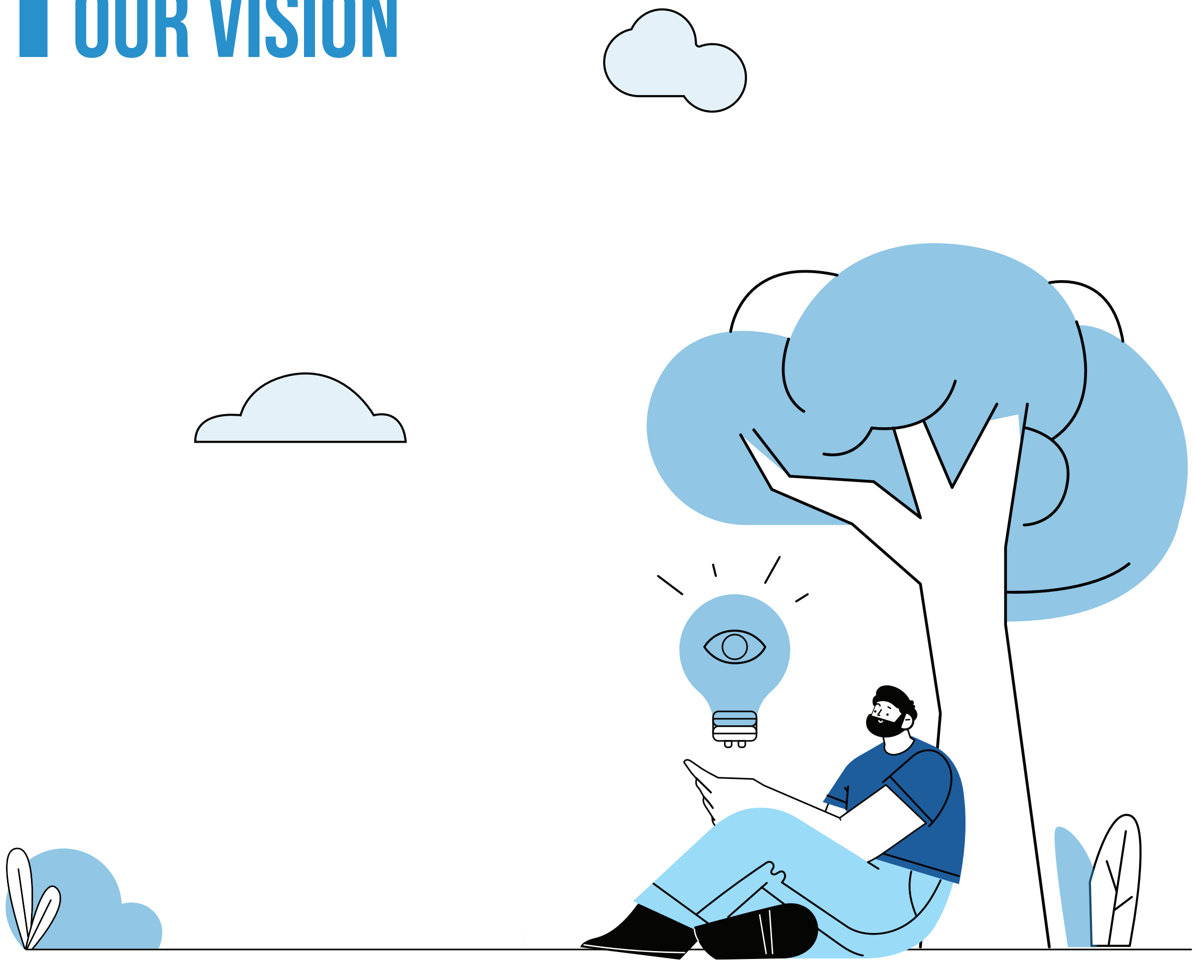
Managing Risk

Do all of my investments match my tolerance for risk? Are my assets and family protected from unforeseen events?

J2 Wealth offers an open platform of exclusive traditional and alternative investments along with insurance and tax planning services.We provide you access to extensive Wealth Management capabilities,which puts you in a position to capitalise on timely investment ideas across asset classes and vehicles,while provide potential downside protection when you need it.

- **Mutual Funds**
- **Fixed Deposits**
- **Direct Equities**
- **Bonds**
- **Exchange Traded Funds**
- **Debentures**
- **Portfolio Management Services**
- **Alternate Investment Fund**
- **Retirement Plan**
- **Term Life**
- **Health**
- **Endowment Plan**
- **General Insurance**
- **Unit Linked Insurance Plan**

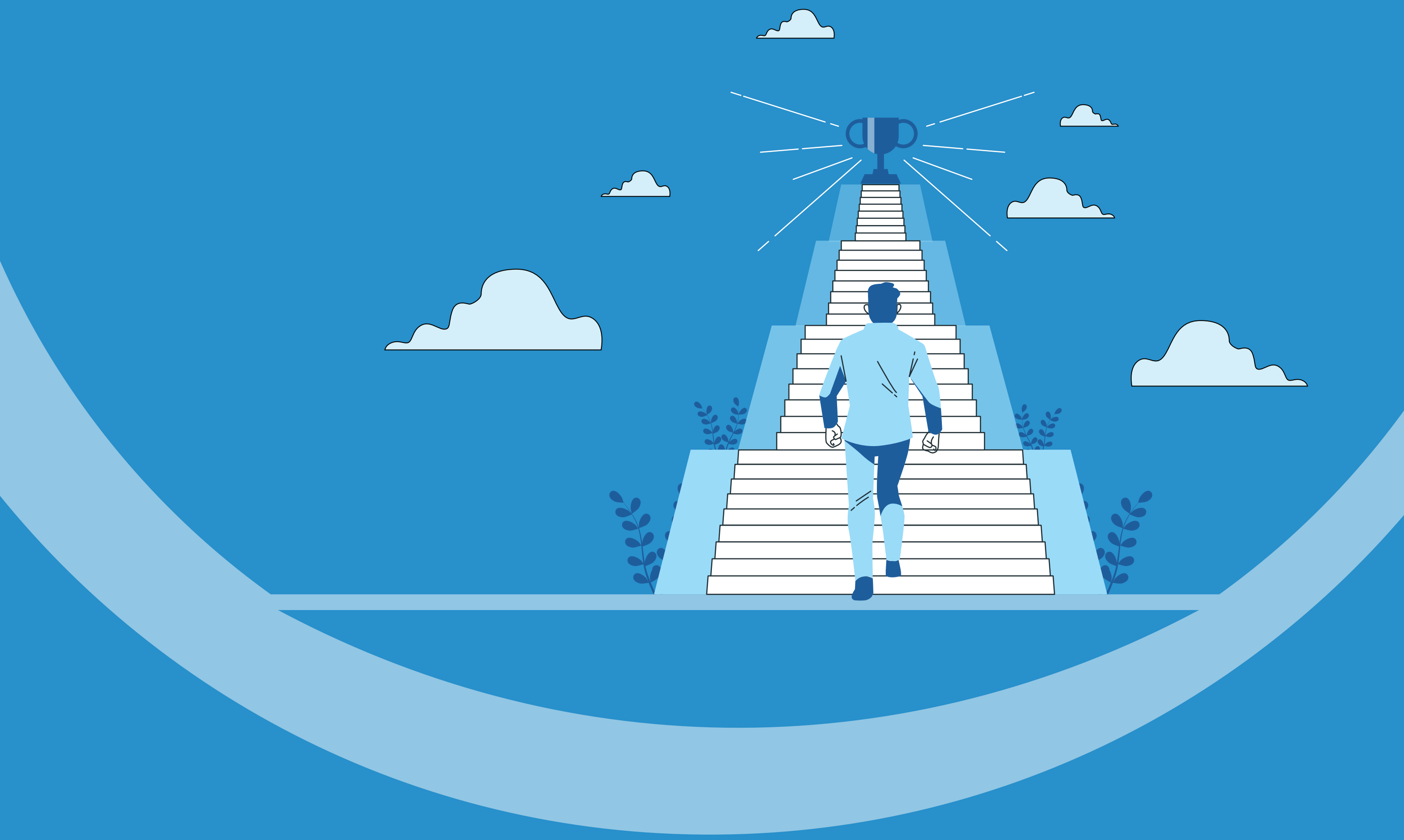
OUR VISION



At J2 Wealth, we understand the importance of forward-thinking in today's fast- changing financial landscape. We understand that incremental innovation is vital to develop a holistic products platform that serves the evolving needs of the uber-rich.

We know that crafting strategies that convert market challenges into opportunities is the key to creating sustainable wealth. This is why we think ahead. This is why we plan.

This is how we help India's wealthiest to **preserve, protect and grow their legacy.** This is the J2 Wealth difference. At J2 Wealth we value our principles as much as our success. As a customer-centric business, J2 Wealth's steadfast mission is to create customers for life. Towards this mission, we leverage a culture based on the core value of TRUST.



MISSION

The firm's mission is to enhance clients' lives and serve as their most trusted advisor. Delivering "white glove client service" isn't just a hollow slogan.
At J2 Wealth, it means treating clients like family and doing everything possible to ensure their well-being for the long-term.

VALUES: PASSION AND PROCESS

PASSION

- Treat clients like family. Clients are the focus of everything the firm does and are the lifeblood of the business.
- “Bring the Rainbow” and strive to achieve beauty and completeness in all situations.
- Strive to remain positive and give 100% in every interaction.
- Act with knowledge and integrity in all situations.
- Remain professional, accountable and respectful at all times, with everyone.

PROCESS

- Find out where a client has been, where they are today, and where they want to go, as their experience can define how they make decisions to move forward.
- Develop an in-depth knowledge of a client’s needs, goals, assets, and challenges before any recommendation.
- Identify and curate a portfolio of services and products to drive growth opportunities.

OUR INVESTMENT PHILISOPHY

Investing for the long-term is core to our approach.
We believe in managing the assets of our clients by having a patient, long-term perspective focused on managing risk and avoiding trendy investments.

Warren Buffett once said, “Investing is simple, but isn’t easy.” The market and economy throw investors curve balls at times. So how can you make sure you’re positioned as well as possible to achieve your goals? Develop a strategy, and stick to it.

We’ve seen a lot of investment fads come and go over time, but our investment philosophy has stayed the same. This helps you build an investment strategy with the potential to weather various market environments.

Why Quality Matters – We strive to identify investments with solid track records. Quality matters, and we conduct a due diligence review of the stocks, bonds and alternative products we recommend.

The Benefits of Diversification* – You’ve heard the saying about not putting all your eggs in one basket. The same holds true for your investments. No one can predict the future, which is why you need to diversify. If your money is in just one investment or a few investments, and one of them experiences some challenges, your entire financial strategy could be in trouble. Quality does matter, but diversification is just as important. It can’t guarantee a profit or protect against loss but it can help reduce risk – and balancing risk and potential return is at the heart of developing an investment strategy
.
The Long-term Perspective – Even if you own diversified, quality investments, their value will still go up and down. This is where maintaining a long-term perspective comes in. Buying when you feel good and selling when you feel bad is not a good investment strategy. If you sell each time the market drops, you’ll have a harder time reaching your goals. This is why we discourage frequent trading. It increases the temptation to make changes based on short-term events. It can also increase fees, commissions and possibly taxes. This doesn’t mean you shouldn’t review your investments periodically. You should. If your needs change over time, we’ll work with you to help rebalance your portfolio accordingly.

" YOU GET RECESSIONS, YOU HAVE STOCK MARKET DECLINES. IF YOU DON'T UNDERSTAND THAT'S GOING TO HAPPEN. THEN YOU'RE NOT READY. YOU WON'T DO WELL IN THE MARKETS ”

- PETER LYNCH

PETER LYNCH

“ THE BIG MONEY IS NOT IN THE BUYING AND THE SELLING, BUT IN THE WAITING ”

-CHARLIE MUNGER

CHARLIE MUNGER

OUR CONTACT

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