

# BLUE SAGE WEALTH



Blue Sage Wealth

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# ABOUT US

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**Founded by IIM alumni and led by seasoned CFP® professionals, our team brings 20 years of combined expertise in wealth management. Our mission is simple yet powerful — to make long-term wealth creation and smart investing accessible to every Indian household.**

**We blend deep industry knowledge, proven processes, and a technology-enabled platform to deliver transparent, need-based solutions tailored to your unique life goals.**

**Whether you're starting your career, growing your business, planning for retirement, or building a legacy, we create strategies designed just for you — so your wealth works as hard as you do.**



# VISION & MISSION

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## Vision

Our vision is to empower individuals and businesses with the tools, knowledge, and resources they need to achieve financial success and security. We aspire to be a trusted partner, offering transparent and accessible financial solutions that simplify complex financial decisions and help our clients build a prosperous future.

## Mission

Our mission is to provide personalized financial guidance, innovative products, and expert advice that address the unique needs of each client. Through integrity, innovation, and a customer-centric approach, we are committed to making financial well-being achievable for everyone.

# BEST IN CLASS TEAM

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**Rajeev Arora**

Founder CFP - FPSB (USA)  
PGDBM (Finance), PGDFA  
CPWM , CTEP - AAFM (USA)  
Prev Org: Tata AMC, ABSL AMC  
Exp: 20+ years



**Sarikaa**

Co-Founder PGDBM  
IIM Previous Organisations:  
Standard Chartered Bank,  
IIFL Wealth  
Exp: 18+ years



**Puneet Sachdeva**

Head - Business Insurance  
Certified Financial Planner -  
FPSB (USA) Gold Medalist -  
Hansraj College  
Exp: 22+ years



**Rakesh Khiwani**

Chartered Accountant FCA,  
B.Com (Hons.) Certified Arbitrator  
Specialist - Taxation Advisory  
Services & Appellate Tribunal  
Exp: 44+ years

# KEY MILESTONES

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## 100+ HNI Families

Trusted by 100+ high-net-worth families, including CEOs, NRIs and top corporate leaders.

## 250 Cr+ AUM

Managing an AUM of 250 Crs plus across Mutual Funds, PMS & AIF.

## Business Partners

More than 20 business partners have collaborated with us in India and Abroad

# OUR SERVICES

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## WEALTH MANAGEMENT

Tailored to each client's goals, it provides holistic solutions to ensure long-term financial security, optimize returns, and minimize risks.

## MULTI FAMILY OFFICE

We offer customized financial management solutions for high-net-worth families and professionals, designed to preserve and grow wealth across generations.

## ESTATE PLANNING

Our goal is to safeguard your wealth, ensure smooth transitions for legal heirs, and minimize legal complications, ensuring that clients' legacies are preserved.

## LEGACY PLANNING

Effective insurance planning helps manage risk, mitigate financial loss, and protect assets, offering peace of mind for both short-term and long-term financial stability.

# WHAT MAKES US DIFFERENT

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## Comprehensive Product Suite

Our comprehensive product suite offers a wide range of solutions designed to meet diverse financial needs. From investment options to protection plans, we provide everything under one roof for seamless wealth building.



## Technology-Enabled Analytics

Technology-enabled analytics empowers smarter investing by tracking portfolio performance & identifying growth opportunities. It brings clarity & confidence to every financial decision & make you stay aligned with your long-term goals.



## Holistic Financial Planning

Holistic financial planning looks at your entire financial life—not just investments or savings. It integrates wealth, protection, and future goals to create a balanced, sustainable roadmap for long-term financial well-being.



## Multi Family Office Solutions

We provide integrated wealth, investment & legacy management services for affluent families. We simplify complexities, preserve wealth across generations & deliver personalized strategies with complete transparency.

# BESPOKE ANALYSIS

## Assessment of AMCs.

- Sponsor Reputation
- Expertise, stability, and continuity of the investment team
- Established investment process
- Track record of consistent performance

## Criteria for Fund Exclusion

- Less than 2 years of history
- AUM under INR 500 Cr
- AMCs with asset class AUM below the median

## Quantitative analysis

- Alpha generated & downside protection
- Risk Adjusted Return, Rolling Returns
- Portfolio construction and positioning

## Qualitative analysis

- Fund manager track record
- AUM Trend, Credit Quality of holdings
- Fund performance consistency

## Focused Funds

- Fund ideas across equity, fixed income, and hybrid categories
- Three fund ideas selected in each category
- Focus funds chosen from the recommendation list based on current market outlook



**We believe in putting 'skin in the game'**



**In-house CA to ensure expert financial oversight, strategic guidance and tax optimisation**



**Mutual Fund Portfolio Evaluation Service**



**Comprehensive view of all holdings (including external assets)**



**Online execution capabilities via the app**

# OUR APPROACH

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We follow a comprehensive 4-step process to carefully select the most suitable investment product based on qualitative & quantitative analysis

## Investment Objective

**01**

Outline the financial goals, risk tolerance and time horizon to understand the type of funds that align with the investor's needs (e.g., growth, income or capital preservation).

## Diversification & Asset Allocation

**03**

Select funds that provide diversification across asset classes and sectors, ensuring a well-balanced portfolio to minimize risk and enhance potential returns.

## Research & Analyze Funds

**02**

Evaluate various mutual funds or other investment vehicles based on factors like historical performance, expense ratios, fund manager expertise, and investment strategy.

## Review & Monitor Performance

**04**

Regularly track the performance of the selected funds, reassess their alignment with your financial goals and make adjustments as needed.

# AWARDS & ACHIEVEMENTS

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## **MDRT (USA): Excellence in Financial Planning 5 years in a row**

Achieved MDRT (USA) for 5 consecutive years — a global recognition for excellence, ethics, and outstanding results in legacy planning & financial planning.

## **COT with Tata AIA in 2024: Excellence in Client-Centric Advice**

Proudly achieving COT recognition by Tata Group in 2024, we are among India's top 1% of financial planners, renowned for legacy planning.

## **BSE Star MF Highest Contribution Award - Online Transactions**

Awarded the BSE Star MF Highest Contribution Award for Online Transactions, recognising our exceptional performance in driving digital investment solutions.

## **ICICI Prudential AMC Highest Market Share Award 2024**

Awarded as the Top Performer Across North in 2024 for achieving Highest Market Share in Mutual Fund Investments by ICICI Prudential AMC

# WEALTH MANAGEMENT

## INVESTMENT SOLUTIONS

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- ◆ **Mutual Funds**
- ◆ **Portfolio Management Services (PMS)**
- ◆ **Broking Services (Stocks, Bonds, ETFs, Commodities, Official partner - Nuvama Broking)**
- ◆ **AIF (Alternate Investment Funds)**
- ◆ **Unlisted Shares**
- ◆ **Bonds - Govt Bonds, PSU Bonds, Private Bonds**
- ◆ **Structured Products**
- ◆ **Business Insurance**
- ◆ **Estate Planning, Official Partner - Nexgen Estate Planning Solutions Pvt Ltd**



# ESTATE PLANNING

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Create a legacy that provides for your family, supports the causes and charities you care about, and maintains your values and vision across future generations

**Will Creation  
Will Registration**

**Trust**

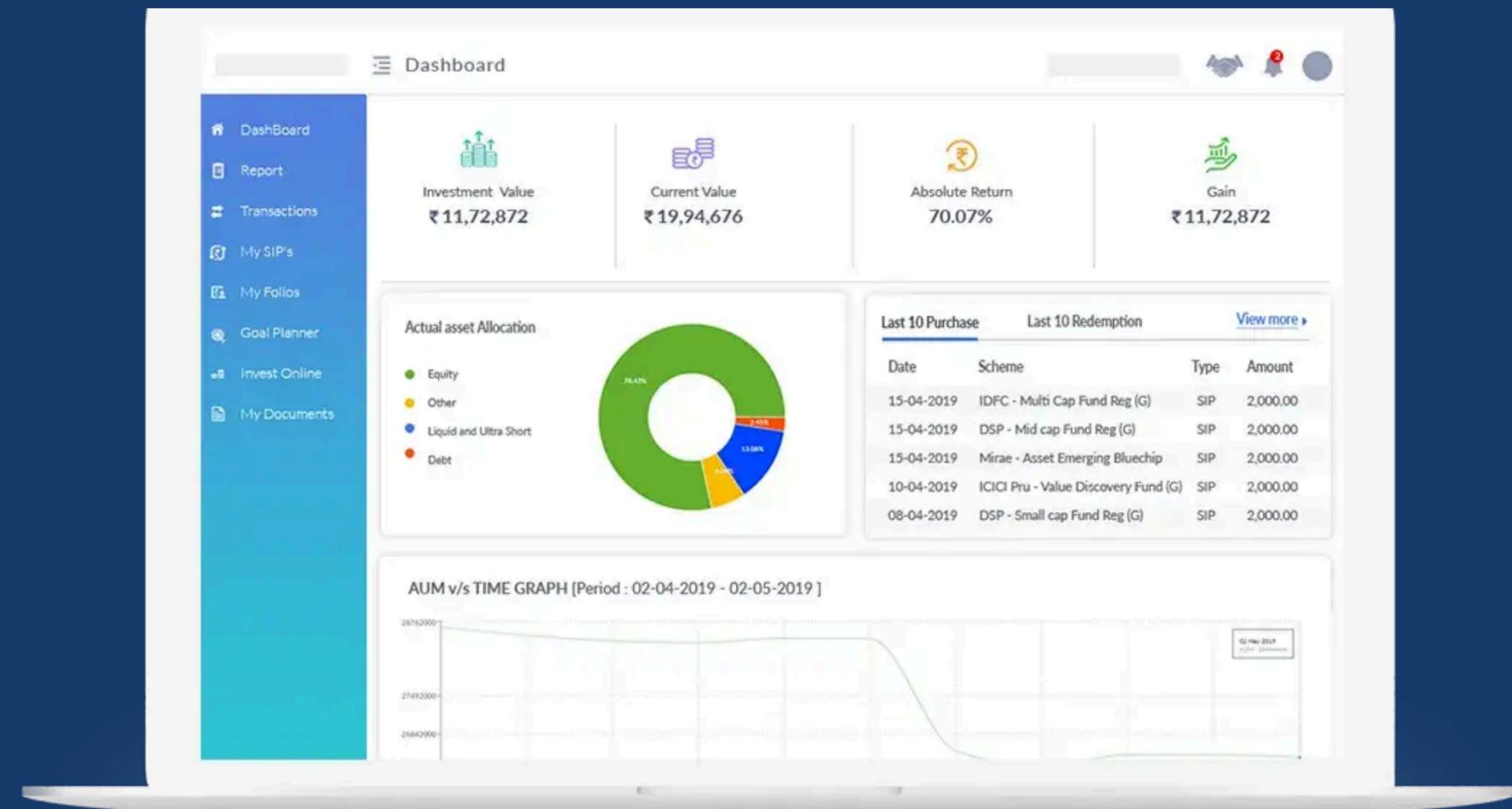
**Drafting the Trust Deed  
Registering the Trust**

**Family Business  
Consulting**

Expert wealth structuring and planning services tailored for your assets in India and across multiple jurisdictions, with a focus on family requirements, asset protection, succession planning for both business and family, inheritance, tax optimization, and more.

# A CUTTING-EDGE, TECHNOLOGY-DRIVEN REPORTING PLATFORM THAT ENABLES YOU TO MONITOR YOUR INVESTMENTS IN REAL TIME

- ✦ Consolidated view of all holdings
- ✦ Paperless transactions on the app
- ✦ Mutual Fund portfolio review service
- ✦ Comprehensive portfolio reports and tax statements
- ✦ Backed by SSL to ensure data security
- ✦ Access to an interactive mobile app and desktop portal



# CONTACT US

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# THANK YOU

Blue Sage Wealth is an AMFI registered mutual fund distributor.

WWW.BLUESAGEWEALTH.IN