



# UpperCrust Wealth

Family Wealth Office

**SHAPING YOUR WEALTH, SECURING YOUR LEGACY**

**20 YEARS OF EXPERTISE**

# UPPERCRUST INTRODUCTION

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UpperCrust Wealth is a boutique wealth management company built on trust and experience offering bespoke solutions to create, manage and plan multi-generational wealth.

## HISTORY

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UpperCrust Wealth is an extended arm of MyAdvisor (Smartlink Group) formed in the year 2000. UpperCrust is a Family Wealth Office advisory firm that serves Ultra-High Net Worth clients who get ultimate insights, exclusivity, and Individuality.

UpperCrust has 1000+ Cr. of AUM in the wealth division and serves around 2500 plus families, 8000 plus retail clients through both Insurance and Investments portfolio of services.

**The group has 35+ Qualified, Experienced Advisors including CMAs, CAs, CFAs, CFPs, MBAs, etc.**



# WHY WEALTH MANAGER IS IMPORTANT?

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- ✓ Portfolio Optimization
- ✓ Strategic Tax Planning
- ✓ Succession Planning
- ✓ Wealth Preservation
- ✓ Client-Centric Approach
- ✓ Personalized Reporting
- ✓ Performance Tracking



# KEY SOLUTIONS

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Portfolio Management Service (PMS)



Alternative Investment Funds



Structured Products



Offshore Investments (Global Equity and ETFs)



ETFs and Indices



Mutual Funds



Digital Lending



Fixed Income Products (Bonds, Deposits)



Insurance



REITs



VC/PE Funds



## PROFESSIONAL MANAGEMENT

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Portfolio Management Service is one of the most transparent ways to invest in an Equity PMS portfolio as the stocks are present in your own Demat you can check the holdings at your convenience.



## SUITABLE RETURNS

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At the end of the day, what really matters is the right returns. Get suitable PMS investment returns with well-managed risk.



## TOTAL TRANSPARENCY

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Our Portfolio Management Services are managed by highly knowledgeable and professional PMS fund managers with decades of experience.



# HOW UPPERCRUST IS DIFFERENT?



Let Investment Experts Manage & **GROW YOUR MONEY**

# TEAM

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**DURGESH PANDYA**  
Managing Director



**MANISH SHAH**  
Director, Private Wealth



**YASH JOSHI**  
Executive Director



**MANOJ ROHIT**  
Senior Relationship  
Manager



**LAVESH KALE**  
AVP-Private Wealth  
Co-fund Manager



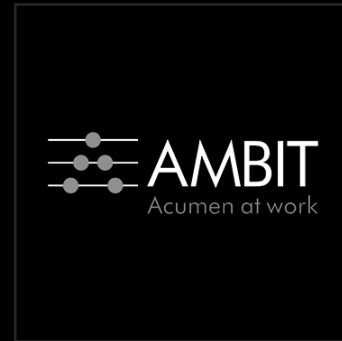
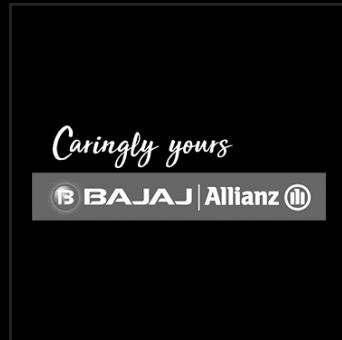
**BIJAL MEHTA**  
Wealth Manager



**ISHA GIL**  
Wealth Manager

**YOU ARE  
BUILDING  
INDIA'S  
FUTURE;  
WE ARE  
BUILDING  
YOURS.**

# OUR GROWTH PARTNERS





## OUR RESPONSIBLE REPORTING

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**MONTHLY**  
Podcast



**MONTHLY**  
Detailed Portfolio  
Factsheet



**QUARTERLY**  
Detailed Newsletter



**Annually**  
Taxation Reports

## THANK YOU

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You can count on us as your investment buddy for any of your investment needs like - listed & unlisted equities, fixed income & global investments.


Consider this as our first step to form and shape our relationship towards UpperCrust Wealth as a platform becoming your family wealth office.


# CONTACT US


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For any grievances /dispute /difference /claim, he /she /it should promptly notify the same to the Portfolio Manager/ Principal Officer of the Portfolio Manager in writing giving sufficient details to enable the Portfolio Manager to take necessary steps. The Portfolio Manager, on receipt of any such grievances, shall take prompt action to redress the same, If the client is not satisfied with the response of the Portfolio manager, the client can lodge their grievances with SEBI at <http://scores.gov.in> or Online conciliation and /or Online arbitration by participating in the ODR portal and /or undertaking dispute resolution in the manner specified in the Circular NO.SEBI /HO /OIAE /OIAE\_IAD-1 / CIR /2023 /131 July 31, 2023, issued by the Securities and Exchange Board of India with regard to Online Resolution of Disputes in the Indian Securities Market. complaint through SCORES (SEBI Complaint Redress System)

Disclaimer: Equities/Securities investments are subject to market risks and there is no assurance or guarantee that the objectives of the Portfolio will be achieved. Past performance of the Portfolio Manager does not indicate the future performance of the portfolio. Investors are not being offered any guaranteed or assured return/s. I.e., either of Principal or appreciation on the portfolio. The liquidity of the Portfolio's investments is inherently restricted by trading volumes in the securities in which it invests. Trading volumes, settlement periods and transfer procedures may restrict the liquidity of the investments made by the Portfolio Manager. The portfolio will be exposed to various risks depending on the investment objective, Investment strategy and the asset allocation. Investors are requested to read the Disclosure Document carefully before investing.