UpperCrust Wealth

Family Wealth Office

SHAPING YOUR WEALTH, SECURING YOUR LEGACY

20 YEARS OF EXPERTISE

UPPERCRUST INTRODUCTION

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

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?

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

KEY SOLUTIONS

- 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

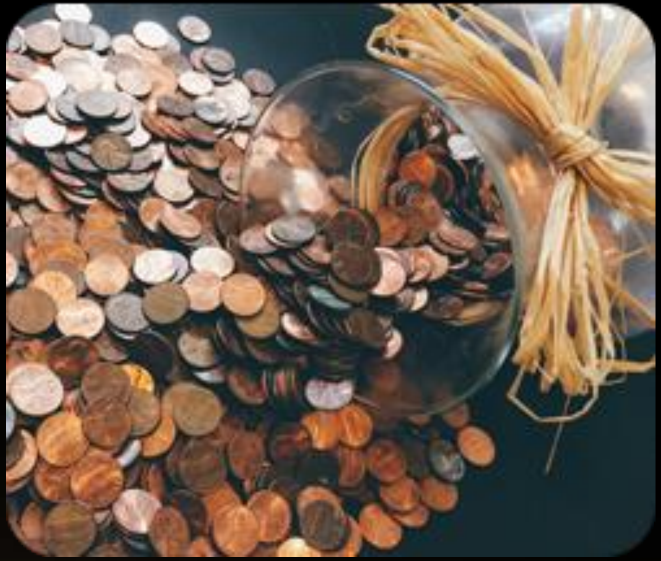
Portfolio Management Service is one of the most transparent ways to invest in an Equity PMS portfolio as the stocks are present in your own Demat you can check the holdings at your convenience.

SUITABLE RETURNS

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

TOTAL TRANSPARENCY

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

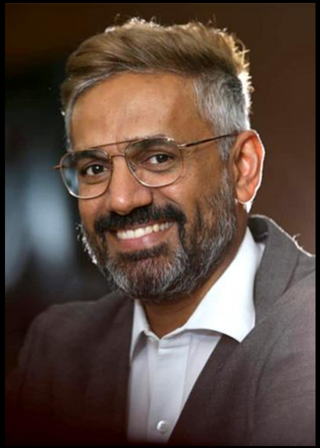


HOW UPPERCRUST IS DIFFERENT?

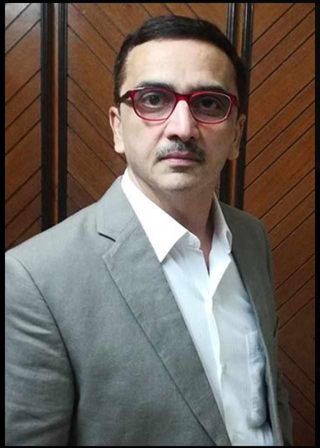
1. Understand regulatory framework of wealth management
2. Identify investment and financial risk management strategies
3. Overcoming wealth management challenges
4. Managing client relationship
5. Evaluating wealth management technology
6. Analyzing wealth performance

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

TEAM

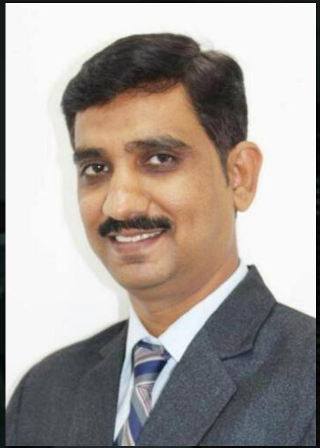


DURGESH PANDYA
Managing Director



MANISH SHAH
Director, Private Wealth

YASH JOSHI
Executive Director



MANOJ ROHIT
Senior Relationship Manager

DHRUV PAWASHE
Equity Research Analyst

BIJAL MEHTA
Wealth Manager

ISHA GIL
Wealth Manager

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

OUR GROWTH PARTNERS

Caringly yours BAJAJ Allianz

CENTRUM

digit

Edelweiss Ideas create, values protect

ICICI PRUDENTIAL LIFE INSURANCE

ICICI Lombard GENERAL INSURANCE

NJ WEALTH

IIFL

TATA AIA LIFE INSURANCE

moat

AMBIT Acumen at work

GROWUPGROUP

a.k. A. K. CAPITAL SERVICES LIMITED BUILDING BONDS

nuvama

FAIRCENT.com EVERY % COUNTS

Vivriti Asset Management

LIQUILOANS For every Borrower, there is a Lender

GRIP

OUR RESPONSIBLE REPORTING

MONTHLY
Podcast

MONTHLY
Detailed Portfolio Factsheet

QUARTERLY
Detailed Newsletter

Annually
Taxation Reports

THANK YOU

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)