Annexure- A

Investor Charter

- **Vision**

To build the world's most trusted personal finance ecosystem that democratizes unbiased advice and helps create wealth for the masses.

- **Mission**

Amplifying wealth creation for individuals by bringing down the cost of client-centric advice leveraging Technology/AI and Behavioral Science.

Details of business transacted by the Investment Adviser with respect to the investors

- We shall enter into an agreement with the client providing all details including fee details, aspect of Conflict-of-interest disclosure and maintaining confidentiality of information.
- We shall do a proper and unbiased risk – profiling and suitability assessment of the client.
- To disclose the name, proprietor name, type of registration, registration number, validity, complete address with telephone numbers and associated SEBI regional/local Office details in its website.

Details of services provided to investors

- Onboarding of Clients
    - o Sharing of agreement copy
    - o Completing KYC of clients
- Disclosure to Clients
    - o To provide full disclosure about its business, affiliations, compensation in the agreement.
    - o To not access client’s accounts or holdings for offering advice.
    - o To disclose the risk profile to the client.
- We shall provide investment advice to the client based on the risk-profiling of the clients and suitability of the client.