

TIPS FOR FINANCIAL HYGIENE

While taking care of your family, friends and work, remember also to take care of your investments. Here are a few tips to safeguard your wealth...



Keep a comprehensive list of all assets in one safe location



Draft a Will to distribute your wealth among your successors



Use one common email ID and mobile no. for all investments



Keep bank details updated for all investments



Update nominee details for all investments, bank accounts, etc.



Relook at your investment portfolio and have proper asset mix



Ensure you have adequate term insurance /family floater cover



Consult a Financial Advisor once a year for portfolio performance review



L&T Financial Services
Mutual Fund