# NAVARTH

Is your money working as smart as you?

**FINANCIAL CLARITY REPORT**
Confidential | Client Copy

Hi [redacted]

Thank you for taking time to fill the survey and also prioritizing the focus on your financial health.

## YOUR BALANCED WHEEL SCORE

**MONEY MINDSET**
21 /100




**CASH FLOW**
13 /100

**GROWTH**
50 /100

**RESILIENCE**
25 /100

**PROTECTION**
42 /100

## YOUR FINANCIAL HEALTH

Your overall financial health profile is **Needs Attention** ●

## YOUR RISK TOLERANCE

Your overall financial risk tolerance is **Balanced**

## YOUR MONEY STYLE

**A measured investor who still likes visible signs of success**

Takes a balanced approach to risk, but spending is sometimes shaped by how it looks to others as much as by the plan itself.

## QUICK TIPS

- Automate long-term goals so they're funded before discretionary or status spending
- Check big purchases against your written goals, not against peers
- Your balanced instincts are a strength — apply the same evenness to spending as you do to investing

A personalized financial wellbeing plan will strengthen your financial health and overall wellbeing.

## WHY SHOULD I ENROLL?

With financial health profile as Needs Attention ●
you receive personalized advice worth -

**More than INR50,000 | over 10 times value for money spent^**

## Ready for your next step?

Book your financial clarity session or share the survey link with a colleague who needs financial clarity.

WhatsApp: 918826337725 Email: connect.navarth@gmail.com

Fee-Based · Personalized · High-Impact

(Note: These benefits are average opportunity value as adviced to the existing clients at NavArth.U)

Disclaimer: Results and analysis are AI driven based on your responses and are intended for indicative purposes only. They do not constitute financial advice.