Sinhasi Consultants Pvt. Ltd.

Sinhasi Consultants Pvt. Ltd are Personalized Financial Advisers, providing end-to-end financial advisory, planning and execution services. Founded in 2005 by Ms Mimi Partha Sarathy, Sinhasi has built up an enviable client base of both individuals and corporates. Sinhasi creates customized financial plans and provides holistic advice on investments, insurance and estate planning.

Our Story

The word “Sinhasi” has its origin in Japanese art and depicts a protective shield, which is meant to ward off evil and ill omen. This is the underlying business credo on which Sinhasi Consultants Pvt Ltd was conceived and created to offer financial advisory and planning services combined with the spirit to “Protect and Enrich” your wealth.

Mimi Partha Sarathy, Managing Director, Sinhasi Consultants Pvt. Ltd, holds a Masters in Finance, Masters in Marketing and Diploma in Accounting from the Webster University in Geneva, Switzerland. She draws together a rich experience from fulfilling assignments with reputed private banking firms in Switzerland.

Prior to setting up Sinhasi, Mimi had a 6-year stint as Regional Head – Private Client Group in ILFS Investsmart Ltd, - later known as HSBC Investsmart.

Team Sinhasi

Today, Team Sinhasi is a rich combination of expertise, qualifications with CFP certifications, and dedication to service excellence, with many decades of work experience in this field. Our service philosophy is grounded in understanding the client’s true needs and delivering a winning blend of professional yet personalized service. All of this is to ensure that we live up to the promise of protecting and growing wealth of our clients, holistically.
The Sinhasi Vision

- To be the PREFERRED investment advisor and custodian to many professionals who seek expert partners to protect and grow their wealth for them.
- WE STAND FOR THE BELIEF THAT ‘we can all chase our dreams without fear only when we ‘know’ we are on “top of our game” with regard to our money and personal finances, and are certain that our finances are growing prudently.
- Our AIM is to build the most enriching, trusting individual relationships where our clients feel certain and secure, and ‘on top of their game’ as we grow their wealth in a simple, disciplined, and holistic manner.

Our Services

1. Advisory and Planning Division:

A. Sinhasi Customized Holistic ‘Enrich’ Financial Plan

This unique and personal financial plan is prepared with great care after considering and studying the individual’s financial goals, purposes and priorities in life for himself and his family, his resources, current lifestyle, and risk profile, and other important factor. A balanced and realistic plan is then prepared to meet these goals. The plan is then approved by the client and then implemented. Product selection is based on competent research and analysis for sound and sustainable returns. Dynamic asset allocation, and continuous focused monitoring is done by Team Sinhasi. Here we address all the key elements of insurance planning, investment planning and will and estate planning.

B. Insurance Planning

Two very important pillars of a financial plan, namely Health Insurance and Life Insurance are comprehensively planned by Team Sinhasi. Home Insurance is also addressed here.

C. Investment Planning

Optimizing returns through a prudent mix of pedigree investment opportunities, Team Sinhasi provides solid investment advice, post prudent analysis of the risk appetite of the investor, the risks involved with each investment solution, time horizon and expectations.
2. Distribution Division:

At Sinhasi, we are of the clear view that one of the criteria for the success of a financial or investment plan is based on the choice of Relevant and Focused Investment Products and Solutions. We at Sinhasi distribute a focused range of such relevant investment opportunities and solutions after prudent analysis of each product across various types and classes of equity and debt mutual funds, Debt – such as Government Bonds, FDs, etc, Real Estate and Realty Funds, capital protected schemes, various portfolio management schemes and structured products, Private Equity Funds, FDs, Bonds and Debentures, PO Schemes, Life and Health Insurance, Will and Estate Planning, etc.
How are we different?

We have been able to build a loyal client base, following a few simple principles:

- **Highest Standards of Integrity, Trust and Values**
- **Preparation and Execution of Customized Holistic Financial Plans.**
- **Focus on achieving the target “Planned” Returns for every investment.**
- **High level of Service Excellence and Client Retention for over 18 years.**
- **Client Protection on investments what NOT to make.**
- **Simple Client Empowerment to be in charge of his or her financial plan.**
- **Team Sinhasi - Sharp, Focussed and Relevant Experts.**
- **Distribution of a Range Of Relevant Focussed Investment Opportunities and Solutions**

Our Wealth – Our Clients and Their Reviews:

*Our Clients are Our Wealth, and it is with great honor that we share with you our CLIENT REVIEWS, their words about Sinhasi, the work we have done for them and what we mean to them. Please do log on to http://www.sinhasi.com/client-speak/ for all details.*
SEBI Registered Investment Adviser:

SINHASI CONSULTANTS PVT LTD is a SEBI registered INVESTMENT ADVISER. As per SEBI Regulations, it is mandatory now for all individuals / body corporates / companies giving financial and investment advisory & planning services to be registered with SEBI, besides all the other required regulatory registrations with AMFI, IRDA, etc.

OUR SEBI REGISTRATION NUMBER - INA200004177

The process of registration is indeed stringent and since we are very clear about following the best practices at all levels of compliance, we are very happy with the certification. The certification involves following and maintaining strict compliance across various investment advisory related issues, which Sinhasi has already been practicing since inception, and also being subject to regular SEBI audit.

Contact us:

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For more information, visit us at www.sinhasi.com

“Set your heart on doing good. Do it over and over again, and you will be filled with joy.”
Gautama Buddha