



ASCENT

FINANCIAL SOLUTIONS PVT. LTD.
SEBI REGISTERED INVESTMENT ADVISER

Excellent, unbiased &
Customized Financial Solutions



Guiding you
towards
Bigger, Better &
Safer tomorrow

About Ascent Financial Solutions

Ascent Financial Solutions is founded by Mr. Prakash Lohana in 2005. Ascent Financial Solutions is the First Financial Planning Company of Gujarat and a leading Financial Planning Company of India.

One meaning of our name ASCENT is "Continuously Growing Upward". We believe in continuously growing in our professional excellence, integrity, and competency. Our objective is to add value in the financial lives of our client in such a manner that they are also "**Continuously Growing Upward**" in their financial success and wealth and in turn can enjoy mental peace.

Our Mission

Our Mission is to Provide Unbiased, Excellent & Customized Financial Solutions to our clients. By providing such solutions we want to transform financial lives of our clients and bring happiness and peace in their lives so that they can be free of their financial worries and focus on other aspects of their life.

Our Philosophy:

At Ascent, we believe that every individual is a different human being. His needs, circumstances, likes and dislikes are different. Considering this we believe in providing unbiased, excellent and customized financial solutions to all our clients.

We work on financial life of each of our clients very deeply and try to bridge the gap between their dreams and their financial resources in the best possible manner.

Our Values:

Client First: At Ascent we always keep our clients interest first. Our primary objective is to provide customized and need based financial solutions and for that we are committed to always keep our clients interest first.

Competence: At Ascent we believe that Personal Finance is a very dynamic subject and our decisions are affecting lives of our clients very deeply so we are committed to keep our knowledge, abilities and skills continuously upgraded to provide you Excellent Financial Solutions.

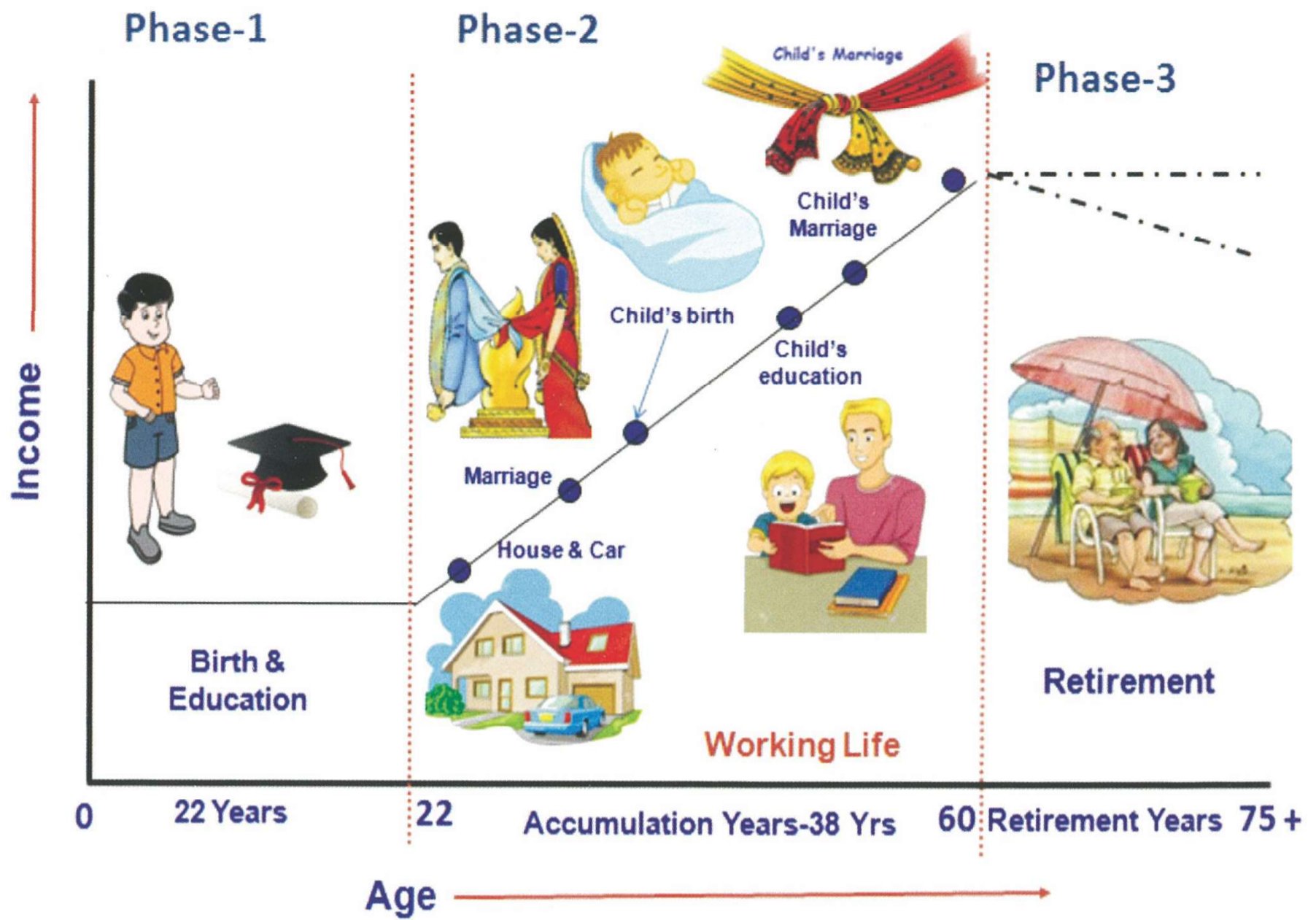
Integrity: We speak and act in an honest manner. Honesty is the foundation of our organization. All our actions and decisions are taken with a single objective of benefitting our clients more and more and adding more value in their lives.

Confidentiality: Financial matters are very confidential and we are committed to our clients to keep their financial matters confidential.



Take your
Financial Life
to new heights

Financial Life



1) Ascent Financial Solutions is a perfect destination to balance your financial affairs. Mr. Prakash Lohana & his team are very meticulous and organized too.

Dr. Tushar Shah (Pediatrician)

Navkar Children Hospital, Karelibaug, Vadodara

2) Doctor's busy schedule do not permit in-depth study & analysis of financial instruments making their financial planning haywire & stressful, I was no different than others till I met Mr. Prakash Lohana from Ascent Financial Solutions, His methodical approach, in-depth counselling sessions & stringent follow up has given me descent returns with peace of mind.

Dr. Rajiv Shah (Orthopaedic, Foot & Ankle surgeon)

Managing Director,
Sunshine Global Hospitals Vadodara, Bharuch & Surat.

3) Mr. Prakashbhai is my Financial Adviser since the beginning of 2013. I have come to appreciate his transparency and honest suggestions. He has very disciplined and systematic approach. He is prompt and thorough in implementation. It has been an enjoyable and meaningful association with him.

Dr. Uday Desai (Ophthalmologist)

Atmaj Eye Care Centre, Vadodara

4) Since the beginning of my career, my priorities were not well defined, the goals were somewhat hazy and the means to build up the savings and a direction for investments was lacking. Meeting Prakash Lohana & Ascent Team was a unique experience in itself (wishing that it had happened a few years earlier on) which made me and my spouse realize that wealth management is a strategy, it as science and it needs vision and a direction with a clearly defined objective. Ascent Team takes care of this expertly and precisely for me since 2011.

Dr. Niranjan Shendurnikar (Pediatrician)

5) I am an NRI from United States. Through a common friend I have known Mr. Prakash Lohana, founder of Ascent Financial Solution, in 2007. Mr. Lohana & Ascent Team is very honest, humble and extremely professional in all his dealings.

I feel extremely lucky to have found Mr. Lohana & Ascent Team, as my financial consultant. He has certainly helped me meet my financial goals. I have recommended his name to my friends who are looking for investing in India

Dr. Ranjan Dey

(Anesthetist & Pain Management Expert) U.S

6) I am a practicing Chartered Accountant. Ten years of my practice left with me no time to manage my own finances. I was very cautious in delegating my personal financial matters to anyone.

But when I met with Certified Financial Planner of Ascent I realized that he is the one who is competent and can manage my personal financial matters better than me. Today I am happy of my decision on choosing Ascent as my Financial Planner. They put the best for me.

Mr. Nirav Shah (Chartered Accountant)

Nirav Shah & Associates, Vadodara .

7) I have been clients with Ascent Financial Solutions since 2012 & I am very happy with their services. Their continual advice on financial planning issues has saved me significant amounts of money.

What really impressed me was the way they devote their time to understand my requirement, their depth of knowledge, lateral thinking, disciplined, systematic approach and their common sense approach. Their professional, ethical and caring demeanor elicits my trust and respect for entire Ascent Team.

Mr. Parag Chaudhary

(Assistant Vice President-Polymerization)

Indorama Polyester Industries PCL, Thailand.

8) We have been clients with Mr. Prakash Lohana & Ascent team since 2009. They have Provided us financial advice that is customized to our needs and goals. Their advice is excellent and the approach is scientific. We have gained very good returns without much jerks in our disciplined investments over the years. Their advice on matters like tax planning, Will Writing and some other financial decision making issues have also helped us to organize those issues.

Dr. Bakulesh Chauhan (Pediatrician)

Dr. Jayshree Chauhan (Gynecologist)

Manav Hospital, Vadodara.

9) Mr. Prakash Lohana and his team has been advising us on financial planning and wealth management since 2015. We are extremely satisfied and happy with their professional approach, transparency and clarity. I have no hesitation in recommending him as financial adviser .

Dr. Ashit Shah (Urologist)

Aashray Urology Institute, Vadodara.



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Prakash Lohana, CFP^{CM}

Certified Financial Planner (Managing Director)

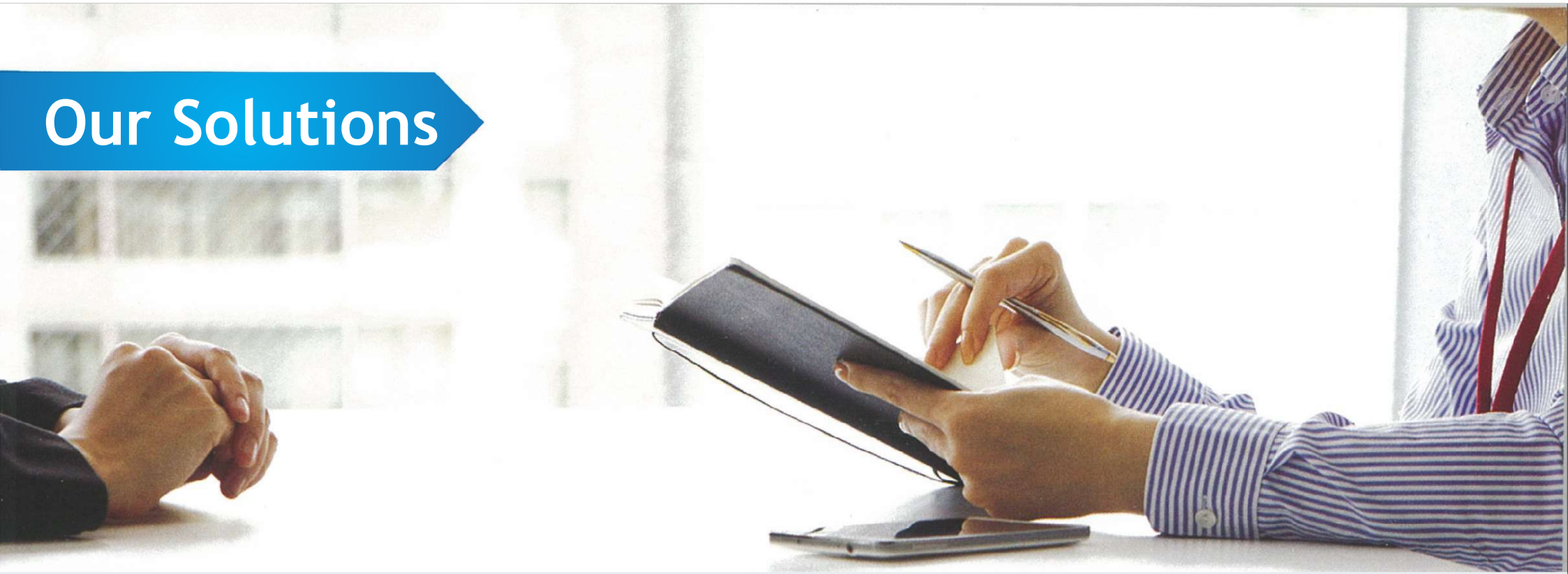
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Our Solutions



Our Solutions:

1. Comprehensive Financial Planning.
2. Financial Planning for Retired Investors.
3. Will Writing Services.
4. Portfolio Make over Services.

What is Financial Planning?

By definition "Financial Planning is a **PROCESS** of meeting your **LIFE GOALS** through **AVAILABLE RESOURCES IN THE BEST POSSIBLE MANNER**".

Let us first understand this in details.

SYSTEMATIC PROCESS:

Financial Planning is a six step process, this means that there is systematic series of action to organize and manage your financial life. This process is defined by Financial Planning Standards Board of India(FPSB).

YOUR LIFE GOALS:

The entire focus of financial planning process is on meeting your Life Goals like Retirement Planning, Higher Education Fund Planning for your children, etc. As against this, traditional approach of investment never focuses on life goals. It only focuses on financial products.

AVAILABLE RESOURCES IN THE BEST POSSIBLE MANNER:

Financial Planning focuses at optimization of your current resources and future resources to meet your life goals. Financial Planning always aims at **optimization** of your resources and not maximization of resources because maximization means maximum risk. You may not need to take that much risk and it may lead to losses in your

Financial Planning Process

