Trusted Wealth Management Partner Since 2018

RISE

Rishta Investments & Savings Experts

For Your Future

About **Us**

Founded in 2018 as Rishta Capital, RISE – Rishta Investments & Savings Experts was born from a vision to simplify wealth creation and make financial solutions accessible to everyone. What began as a boutique advisory firm has now grown into a trusted financial partner for individuals, families, corporates, NGOs and partnership firms.

At RISE, we believe wealth is not just about money—it's about dreams, security and long-term prosperity. Whether it's an individual saving for a child's education or an organization managing surplus reserves, every client deserves transparent, ethical and goal-driven financial strategies.

Our Mission

Our mission is to simplify investments and deliver holistic financial planning solutions that help clients achieve their life goals with confidence. We aim to make money work intelligently and efficiently—creating growth, security and prosperity even when our clients sleep. By combining ethical advisory, innovative strategies and advanced technologies, we empower individuals, businesses and organizations to build wealth that lasts for generations.

Our Vision

Our vision is to become South India's most trusted and innovative financial advisory brand by 2030. We aspire to be the go-to financial partner for individuals, corporates, NGOs and institutions—delivering transparent, personalized and future-ready solutions. Through a relentless focus on trust, excellence and innovation, RISE seeks to not only grow wealth but also contribute to the financial independence, security and success of every client we serve.

Our Visionary

At the heart of RISE is its founder, Mr. Sachin P. M. (Sachin Thickurissy), a visionary entrepreneur and financial advisor with over 14 years of experience. He recognized a key challenge in the industry—clients were presented with countless options but lacked transparency and guidance. His vision was to build a company rooted in trust, ethics and client-first practices, ensuring wealth creation is scientific, ethical and aligned with true goals.

Since establishing Rishta Capital in 2018, he has been a key architect of its growth and evolution. Armed with an MBA from Janson's School of Business, Coimbatore, and a strong background in Banking and NBFCs, he has worked with leading institutions such as Citibank, ICICI Securities, Axis Bank and Bajaj Capital. His expertise spans HNI/NRI Wealth Management, Risk & Tax Planning, Estate & Retirement Planning, and Legacy Planning.

FOUNDER | MD

As a Certified Private Wealth Manager (CPWM), he has also served as a SEBI-registered Investment Advisor and an AMFI-certified financial consultant, advising high-profile clients across diverse segments. As the Founder of RISE (Rishta Investments & Savings Experts), he personally leads the Wealth Management Division with compliance, expertise, and a deep commitment to client success.

His Core Belief: Wealth creation should not feel like speculation. It must be scientific, ethical and aligned with the client's true goals.

Our Evolution

2018

Founded as Rishta Capital

2019

Expanded into Mutual Fund Advisory

2020

Successfully navigated clients through the pandemic, delivering positive ROI

2021

Introduced Insurance & Tax Planning services for individuals and corporates

2022

Began offering tailored financial solutions for NGOs and partnership firms to manage and grow surplus reserves

2023

Rebranded as RISE – Rishta Investments & Savings Experts

2024

Launched tech-enabled client monitoring systems and institutional reporting

Our Core Services

For Individuals & Families

Mutual Funds

We guide you in selecting the right mutual funds aligned with your goals, risk profile, and time horizon, ensuring diversification, transparency, and the potential for better returns.

Insurance Solutions (Life, Health & Business)

We offer tailored insurance solutions across life, health and business to safeguard your wealth, secure your family and protect your enterprise from unforeseen risks.

Retirement Planning

We design personalized retirement plans that ensure financial independence, steady income and peace of mind for your golden years.

Tax Planning & Wealth Management

We minimize tax liabilities while strategically managing and growing your wealth with transparency, compliance, and long-term focus.

For NGOs, Corporates & Partnership Firms

Customized Surplus Fund Management Strategies

Cash Flow–Aligned Investment Planning

Risk-Balanced Wealth Growth Solutions

Reporting & Monitoring Tailored for Boards and Stakeholders

Why Choose RISE?

At RISE (Rishta Investments & Savings Experts), we go beyond financial advisory—we build lasting partnerships based on trust, ethics and results. Whether you are an individual securing your family's future or an organization managing surplus reserves, our strategies are designed to empower you.

For Individuals

We provide transparent, ethical and goal-driven advisory tailored to your unique aspirations—be it wealth creation, retirement planning, or protecting your family's future.

For Organizations

- **NGOs:** Endowment growth strategies that let you focus on your mission while we optimize your reserves.
- **Corporates:** Surplus management that converts idle cash into productive, growth-oriented assets.
- **Partnership Firms:** Wealth strategies designed to ensure stability, sustainability and expansion.

One-Stop Financial Partner

With customized solutions for both individuals and institutions, RISE stands as your trusted wealth management partner—committed to long-term prosperity, security, and growth.

We're Since
2018

RISE
Rishta Investments & Savings Experts

Our Process

The RISE Way for Individuals

UNDERSTANDING YOUR GOALS

We take the time to understand your financial priorities—whether it's creating wealth, protecting your family, or planning for the future—so every strategy reflects your true aspirations.

RISK PROFILING

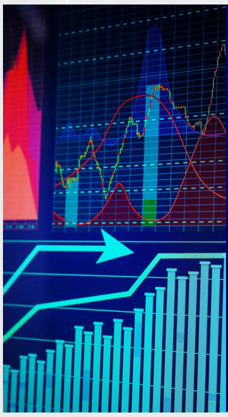
We evaluate your ability and willingness to take risks, balancing comfort with growth potential. This helps us design strategies that align with your financial capacity while keeping you confident in every decision.

STRATEGY BUILDING

We create personalized, goal-based strategies tailored to your unique aspirations and risk profile. Every plan is designed to provide clarity, balance and a clear path toward long-term financial success.

ALLOCATION & EXECUTION

We carefully allocate investments across suitable financial instruments to balance risk and growth, ensuring disciplined execution and effective deployment for sustainable, long-term wealth creation



REGULAR MONITORING

We continuously track your portfolio's performance to ensure it stays aligned with your goals. With proactive oversight, we identify opportunities and risks early, keeping your financial journey on the right path.

REVIEW & REBALANCE

We carefully allocate investments across suitable financial instruments to balance risk and growth, ensuring disciplined execution and effective deployment for sustainable, long-term wealth creation

The RISE Way for Organizations

Understanding the Mission

We begin by understanding your organization's mission, financial priorities and surplus reserves. By aligning our strategies with your compliance needs and long-term vision, we ensure that every financial plan supports both growth and purpose.

Strategy Design

We develop customized, risk-appropriate strategies tailored to your organization's mission and financial goals. Our focus is on creating sustainable, compliant and growth-oriented solutions that empower long-term impact

Diversified Allocation

We structure portfolios across diverse asset classes to balance stability, liquidity and growth. This diversification helps safeguard organizational reserves while ensuring consistent wealth creation over time.

Transparent Reporting

We provide detailed and easy-to-understand quarterly reports, ensuring complete transparency for boards and stakeholders. This clarity builds trust and keeps decision-makers fully informed about organizational wealth performance.

Our USP

we believe wealth management goes beyond numbers—it's about trust, transparency, and tailored solutions. Our Unique Selling Proposition lies in combining personalized financial strategies with ethical practices and cutting-edge technology to deliver results that truly matter.

What Sets Us Apart

Client-Centric Approach

Every individual, business, or NGO is unique. We design strategies that are customized, transparent, and aligned with long-term goals.

Compliance & Integrity

As a SEBI-registered and AMFI-certified advisory, we uphold the highest regulatory standards, ensuring safety and transparency in all financial decisions.

Expertise & Experience

With over 14 years of industry knowledge, we specialize in HNI/NRI Wealth Management, Risk & Tax Planning, Retirement & Estate Planning and Institutional Advisory.

Technology-Enabled Solutions

From AI-driven dashboards to real-time portfolio tracking, we ensure clients are empowered with insights and control.

Diverse Clientele

Serving individuals, families, corporates, NGOs and partnerships with dedication, ensuring growth, sustainability and tailored financial solutions for every client segment.

Holistic Financial Planning

Beyond investments, we focus on wealth creation, preservation and transfer, delivering strategies for long-term prosperity and financial security.

Social Impact

We believe true financial success extends beyond individuals to the communities we serve. Our commitment to social responsibility drives us to share knowledge, build confidence and empower people from all walks of life to achieve financial independence.

- Financial Literacy Programs in schools and colleges
- Workshops for Women Entrepreneurs to encourage financial independence
- Training and Mentorship Programs for Young Entrepreneurs
- Free Advisory Sessions for NGOs on surplus fund management

By empowering society with financial education and sustainable practices, we create not only wealth but also stronger, more resilient communities.

Future Roadmap

AI-Driven Dashboards

Smart tools for individuals and institutions to track and optimize their wealth.

Corporate Advisory Division

A dedicated desk for corporates, NGOs and partnership firms.

Pan-India Expansion

Establishing a nationwide presence with a vision to reach every corner of India by 2030.

RISE Academy

Training modules on wealth creation designed for students, corporates and nonprofits.

Global Collaborations

Partnerships with international financial institutions to bring world-class expertise to our clients.

Thank You

Think Wealth, Think RISE

We don't just grow investments — we nurture wealth for a secure and peaceful future.

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