

Notes - Mintues of the meeting

Meeting date:

Points discussed:

1. It was discussed that Abhay Dixit's MF portfolio be shifted to our ARN
2. Policy documents to be collected from LIC
3. KYC for Shilpa Jain to be done in two weeks
4. Abhay Dixit to articulate the financial goals they would like to save for
5. Increase Health Insurance sum assured to Rs.10,00,000
6. Abhay Dixit should buy a personal accident policy and a critical illness policy. Sum assured to be decided later
7. PPF cheque submission for the financial year 2016-17 to be done
8. Maturity of ICICI Bank FD. Proceeds to be reinvested in MF
9. Updation of contact details in MF
10. Income Tax Outstanding Demand - Rectification against AY 2009-10
11. Next meeting to be held in August 1st week