

CKREDENCE WEALTH MANAGEMENT PRIVATE LIMITED

PROVIDES INVESTMENT ADVISORY SERVICES

Ckredence Wealth Investment Advisers provides Investment Advisory Services.

Type Of Registration	Non-Individual
SEBI Registration No.	INA000020846
Validity Of Registration	7th August 2025– Perpetual
BSE IA Enlistment Number	2307
Corporate Identification Number (CIN)	U67120GJ2001PTC039294
Registered Office Address	901,902 & 903, International Wealth Center, VIP Road, Vesu, Surat, Gujarat, 395007
Contact	+0261–6946666/660

Objectives:

The purpose of the Document is to provide basic and essential information about the Investment Advisory Services to assist the prospective client in making an informed decision for engaging an Investment Adviser for availing its services.

SEBI Disclaimer:

This document has been prepared in pursuance of Regulation 18 of the Securities and Exchange Board of India (Investment Advisers) Regulations, 2013. This document has neither been approved nor disapproved by SEBI, nor has SEBI certified the accuracy or adequacy of the contents of this Document.

1. **About the Company:**

Ckredence Wealth Management Private Limited is registered with the Securities and Exchange Board of India (“SEBI”) as an Investment Adviser and Portfolio Manager under SEBI (Investment Advisers) Regulations, 2013 (“IA regulations”) vide registration no. INA000020846 dated August 7, 2025, and SEBI (Portfolio Managers) Regulations 2020. Vide Registration no. INP000007164 dated June 7, 2021. pursuant to which it provides investment advisory services and Portfolio management services to its clients.

2. **Disciplinary history:**

There is no such case of any disciplinary history against the Adviser as of this date.

3. **Terms and Conditions on which it offers advisory services:**

Specific terms and conditions for the investment advisory services are provided under the Investment Advisory Service Agreement.

4. Redressal of client grievances

For any Grievance

Specific terms and conditions for the investment advisory servics are provided under the Investment Advisory Service Agreement.

Details Of Designation	Contact Person Name	Physical Address Location	Contact No.	Email-ID
Customer Care	Ms. Riya Bansiwala	901,902 & 903, International Wealth Center, VIP Road,Vesu, Surat, Gujarat, 395007	+0261-6946660/659	Grievancesria@ckredencewealth.com
Compliance Officer	Mr. Prakash Mavani		+0261-6946651	Prakash.mavani@ckredencewealth.com
Principal Officer	Mr. Mohit Patel		+0261-6946670	Mohit.patel@ckredencewealth.com

It is mandatory for the Client having a grievance to take up the matter directly with the Investment Adviser. The Investment Adviser shall redress the grievance within 21 (Twenty-one) calendar days from the date of receipt of the complaint. In case the Client is still not satisfied with the response, a grievance can be lodged with SEBI at <https://scores.gov.in/scores/Welcome.html>, or one may also write to any of the offices of SEBI or contact SEBI Office on Toll Free Helpline at 1800 266 7575/ 1800 22 7575. The complaint shall be lodged on SCORES 2.0 within one year from the date of the cause of action, where,

- The complainant has approached Ckredence Wealth for redressal of the complaint and,
- Ckredence Wealth has rejected the complaint or,
- The complainant has not received any communication from Ckredence Wealth or,
- The complainant is not satisfied with the reply received or the redressal action taken by Ckredence Wealth.

If the Client is not satisfied with the extent of redressal of the grievance by the Investment Adviser, there is a one-time option for “Compliant review Facility” of the extent of the redressal, which can be exercised within 15 days from the date of closure of the complaint on SCORES 2.0. Thereafter, the complaint shall be escalated to the supervising official of the dealing officer of SEBI.

After exhausting all the aforementioned options for resolution, if the client(s) is still not satisfied, they can initiate dispute resolution through the Online Dispute Resolution Portal (‘ODR Portal’) at <https://smartodr.in/login>.

Alternatively, the client(s) can also directly initiate dispute resolution through the ODR Portal if the grievance lodged with the Investment Adviser is not satisfactorily resolved at any stage of the subsequent escalations mentioned above.

The dispute resolution through the ODR Portal can be initiated when the complaint/dispute is not under consideration in SCORES guidelines or not pending before any arbitral process, court, tribunal, or consumer forum, or is non-arbitrable in terms of Indian law.

5. Other Disclosures

- We are not affiliated with any other intermediaries, nor do we receive any brokerage or commission from any third party.
- We do not recommend any stockbroker or other intermediary to a client. Nor do we receive any consideration by way of remuneration or compensation or in any other form whatsoever from a stockbroker or other intermediary.
- Investments in debt instruments are subject to reinvestment risks as interest rates prevailing on interest amount or maturity due dates may differ from the original coupon of the bond, which might result in the proceeds being invested at a lower rate.
- If the client wants an opinion on the specific positions made by him only, we will be able to suggest an appropriate view on the securities. Such a suggestion/view under any circumstances shall be considered as an opinion (not advice) from our side, and we advise the client to consider our opinion and not consult us to make his/her final decision. We are not liable for any losses whatsoever our client may incur in accepting this opinion.
- Investment Adviser, its directors, associates, and employees might have positions or might have recommended to clients, which might be in line with the recommendations made here. Investment Advisers or their family members may or may not trade or may have investments in the same recommendations.
- The names of the products/nature of investments do not in any manner indicate their prospects or returns. The performance of equity products may be adversely affected by the performance of individual companies, changes in the marketplace, and industry-specific and macroeconomic factors.
- We do not have any association in any manner with any issuer of products/securities; this ensures that there are no actual or potential conflicts of interest. This also ensures that objectivity or independence in the carrying on of investment advisory services is not compromised.
- The information on the website is updated from time to time. Ckredence Wealth Management Private Limited, however, excludes any warranties (whether expressed or implied) as to the quality, consistency, efficacy, completeness, performance, fitness, or any of the contents of the website.
- Client is always advised to read, understand, and agree to the terms & conditions & disclaimer of service.
- We do not guarantee any profit/return.
- We do not provide any profit/loss sharing services, guaranteed profit services, or Demat services.