



YOUR HOLISTIC DESTINATION FOR
“Moulding Wealth with **Clarity**”



A Boutique & Independent Wealth Management Firm

At Clay Financial Services we believe wealth is shaped over time through thoughtful decisions, enduring relationships and a clear vision for the future. Like CLAY in the hands of a skilled craftsman, wealth has the potential to be carefully moulded into a lasting legacy.

As a boutique & independent wealth management firm we partner with High Net Worth Individuals (HNIs), Ultra High Net Worth Individuals (UHNIs), entrepreneurs, professionals and family offices to create bespoke wealth strategies aligned with their unique aspirations and long-term objectives.

Our independence ensures objective guidance, free from proprietary product mandates, while our boutique approach allows us to build lasting relationships founded on trust, discretion and personalised attention. Through comprehensive wealth modelling, high quality research and an open architecture investment platform we help families preserve, grow and seamlessly transition wealth across generations.

At Clay Financial Services, we are more than wealth managers - we are trusted partners in shaping enduring financial legacies.

Our Mission

To bring clarity to wealth and purpose to prosperity aligning every financial decision with what truly matters and fulfilling the timeless yearning to create a legacy that endures.

Our Vision

To build a future where wealth serves meaning, empowering every client to live with clarity, act with alignment and leave behind a legacy that reflects who they truly are.



The CLAY Philosophy

Our name isn't just
what we are called -

IT IS WHAT WE STAND FOR

C- Clarity

*Clear advice,
straightforward plans*

We believe every financial strategy should be as transparent as it is effective. No jargons, no hidden agendas just honest advice and a roadmap you can actually understand

L - Longevity

*Built for generations,
not quarters*

We focus on sustainable, long-term wealth preservation strategies designed to strengthen across market cycles and endure across generations, not just perform well for a short tenure

A - Alignment

Your goals, our strategy

Every recommendation is measured against one standard does it align with your values, your goals and your family's vision not a product target or a house agenda

Y - Yearning

*Understanding what you're
really working toward*

Beyond portfolios and returns we take the time to understand your deeper ambitions a home, a legacy, your children's future and build a plan that actively moves you toward them

Who We Serve

At Clay Financial Services, we partner with



Individuals

Families

Whose financial lives demand thoughtful planning, disciplined investment management and a trusted long-term relationship

High-Net-Worth & Ultra-High-Net-Worth Individuals (HNIs & UHNIs)

As financial assets grow so does the complexity of managing them. Balancing risk, identifying the right opportunities & ensuring every decision supports long-term wealth creation & legacy demands expert guidance

We partner with HNIs and UHNIs to build, preserve and grow wealth through personalized investment strategies, comprehensive financial planning and disciplined portfolio management. Our solutions span traditional options, alternative investments & global opportunities ensuring every financial decision aligns with long-term objectives while preserving and transferring wealth across generations

Family Offices & Business Families

Managing significant & multi generational wealth comes with unique complexities from co-ordinating investments & reporting to succession planning, governance & collaboration with legal, tax & financial advisors

For families managing significant and multi-generational wealth we act as a trusted strategic partner. Through our Personal CFO approach we help coordinate investments, reporting, succession planning and collaboration with accountants, legal advisors and other professionals bringing clarity, structure and continuity to the family's financial ecosystem

Non-Resident Indians (NRIs)

Managing wealth across borders comes with its own complexities from cross jurisdiction tax planning to currency risk and regulatory compliance

We help NRIs build and manage India linked and global portfolios with clarity and confidence, offering guidance on repatriation, investment structuring so their wealth stays aligned with both their life abroad and their financial roots back home

What Sets Us Apart



Boutique & Independent

Objective, unbiased advice tailored exclusively to your financial goals where every strategy is thoughtfully crafted around your aspirations, risk profile and long-term vision



Open Architecture Platform

Access a carefully curated universe of investment solutions across leading fund managers and asset classes



Founder-led Advisory

Benefit from experienced leadership and strategic oversight rooted in decades of wealth management expertise



Long Term Partnership

We build enduring relationships, supporting your wealth journey through every milestone and generation



Personal CFO Approach

A dedicated partner coordinating every aspect of your financial life from investments to legacy planning

Our Four Pillars of Manager Selection

Just as CLAY is carefully shaped into something enduring, every investment manager is evaluated through a disciplined framework before earning a place in our investment universe



Our Services at a Glance

Holistic Wealth Management

One integrated strategy

Financial Planning

Ambition into a roadmap

Third Party Product Evaluation

Independent Scrutiny

360° Consolidated Reporting

One clear picture

Unbiased Portfolio Reviews

A second opinion, no sale

Trust & Succession Planning

Legacy, exactly as intended

Investment Universe @ CLAY

Mutual Funds

PMS

AIF

Corporate FDs

Bonds

High Yield NCDs

Private Credit AIF

Private Equity AIF

SIFs

Real Estate AIF

Direct/
Co-investment Opportunities

Offshore Investment

The Mind Behind CLAY



AMIT DASSANI

Founder & Chief Wealth Architect

For over two decades, Amit has advised affluent families, entrepreneurs, promoters and Family Offices on preserving, growing and transferring wealth across generations. He founded Clay Financial Services with a singular purpose: **to deliver independent, conflict-free wealth management built on trust, transparency and long-term relationships.**

Having navigated multiple market cycles and evolving investment landscapes, Amit brings a **rare balance of disciplined research and practical wealth management expertise.** His philosophy is simple — preserve capital, identify sustainable opportunities & build strategies around each family's long-term objectives, values and legacy.

Before founding Clay Financial Services, Amit held leadership and client advisory roles at some of India's leading private wealth institutions, including **LGT Wealth, 360 ONE Wealth & Motilal Oswal Private Wealth.** Over his career, he has advised on client assets exceeding **INR 3,500 crore**, working with some of India's most discerning investors on complex wealth management needs.

His career of 21 years spans across **Product Research & Management, Investment Advisory & Client Relationship Management.** The research-driven approach helps him spot opportunities while staying disciplined on risk and long-term preservation.

Under Amit's leadership, Clay Financial Services takes a comprehensive view of wealth management — **one that goes beyond investment selection to strategic asset allocation, tax-efficient structuring, alternative investments, succession planning, estate planning and coordinated wealth oversight,** so every part of a family's financial life works together.

Beyond his practice, Amit is committed to advancing the profession itself. As a trainer at CIEL (Centre for Investment Education and Learning) he mentors aspiring investment professionals, drawing on decades of hands-on experience.

Amit is a Certified Financial Planner (CFP®) with multiple NISM certifications. He holds an MBA in Finance from K.J. Somaiya Institute of Management Studies & Research (SIMSR), Mumbai and a B.Com (Honours) in Accountancy & Statistics from the University of Rajasthan.



CLAY FINANCIAL SERVICES PRIVATE LIMITED

📍 616, Ganesh Glory, Jagatpur Road, Off SG Highway, Ahmedabad – 382470



www.clayfs.in



info@clayfs.in



+91 98334 50490



www.clayfs.in

Disclaimer : Clay Financial Services Private Limited ("CLAY") is a AMFI Registered MF & SIF Distributor (ARN 345636) & APMI Registered PMS Distributor (APRN 07680) & CIN NO (U66190GJ2025PTC166341).

The content of this Document is prepared and owned by CLAY & is strictly meant for circulation to the clients & prospects of CLAY. All opinions, estimates and information in this presentation are, regardless of source, given in good faith and may only be valid as of the date of its publication. This Document may be based on or contain information, such as opinions, recommendations, estimates, price targets and valuations which emanate from: employees/analysts of CLAY and other 'external sources'. CLAY has deemed the external sources to be reliable, but neither CLAY nor any of its employees/analysts guarantee the accuracy, adequacy or completeness of such external information. Client is advised to read the investment related documents to understand the Financial Product / Strategy and agree with the terms basis the Agreement executed with the Fund. Any decision or action taken or not taken by the Client based on the recommendation(s) shall be solely and entirely at risk of the Client. The risk of investing in certain financial instruments associated with securities market, including those mentioned in this document, is generally high. CLAY assumes no liability as regards to any investment, divestment or retention decision taken by the investor on the basis of this Document. CLAY and its Promoters, Directors, employees or any representatives shall not accept any responsibility for any direct or indirect or consequential loss suffered by the Client or any other person as a result of Client acting, or deciding not to act, in reliance upon such information, opinions and analysis.