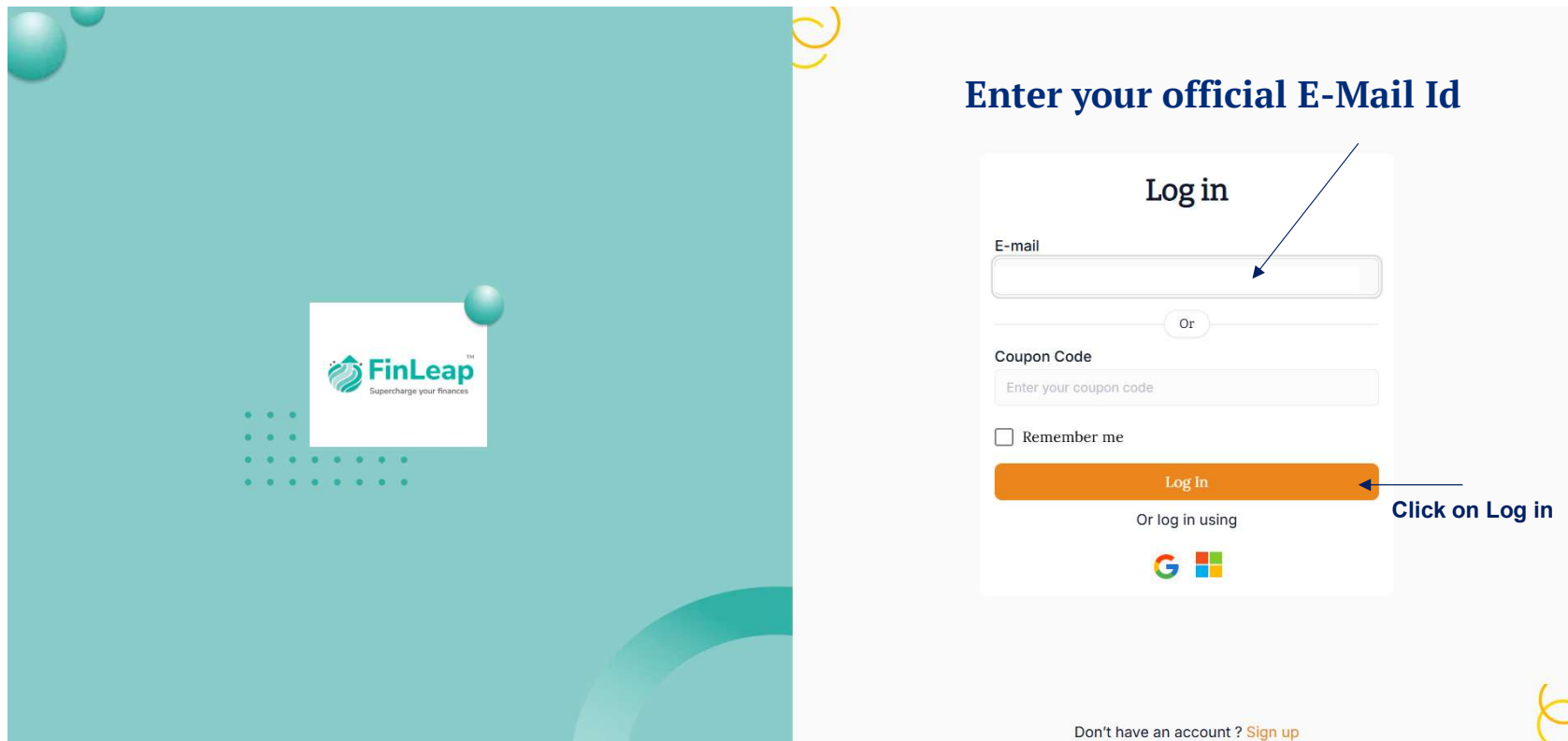


Step by step guide for
FinLeap Platform

[Login : https://finleap.finsafe.in/login](https://finleap.finsafe.in/login)



The image shows a screenshot of the FinLeap login page. On the left, there is a teal background with a white box containing the FinLeap logo and the tagline "Supercharge your finances". On the right, there is a white login form titled "Log in". The form includes an "E-mail" input field with a blue arrow pointing to it, an "Or" separator, a "Coupon Code" input field with the placeholder text "Enter your coupon code", a "Remember me" checkbox, and an orange "Log In" button with a blue arrow pointing to it and the text "Click on Log in" next to it. Below the button, it says "Or log in using" followed by Google and Microsoft icons. At the bottom of the form, there is a link: "Don't have an account? Sign up".

Enter your official E-Mail Id

Log in

E-mail

Or

Coupon Code

Enter your coupon code

Remember me

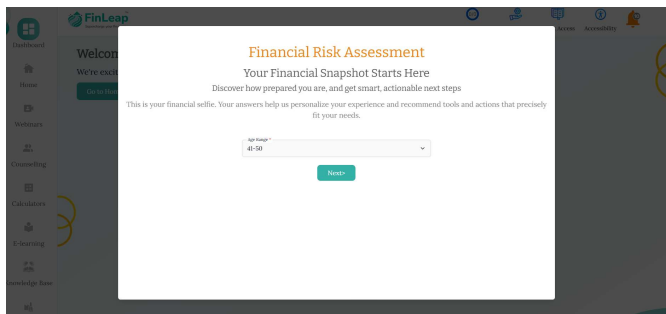
Log In Click on Log in

Or log in using

Don't have an account? [Sign up](#)



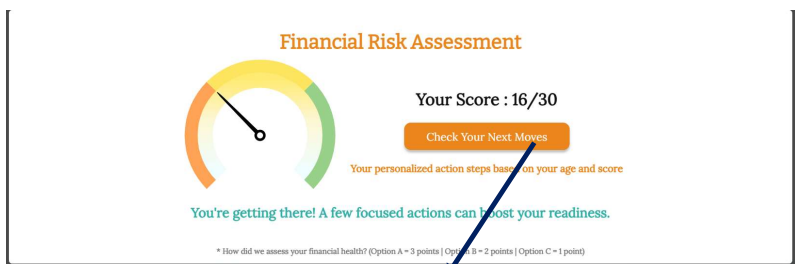
Step 1 : Complete your Financial Risk Assessment



Select Age Range



Complete Questionnaire



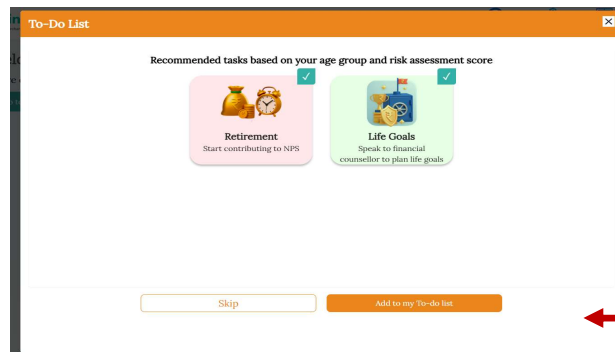
View Risk Score



Click on Submit button

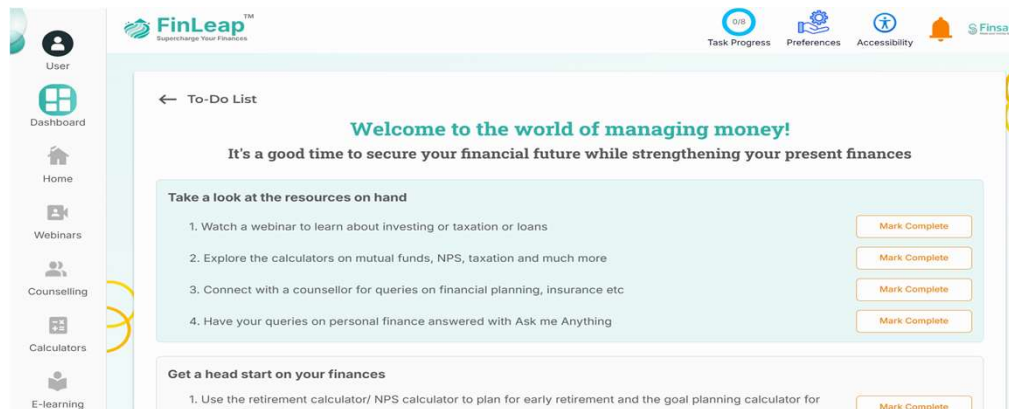


Step 3: Click the check box for the task that you want to select



← Click on Add to my To-Do List

Step 4: Click on Task Progress to view your To-Do List



← Click on Mark Complete once you complete the task



Features to explore in FinLeap Platform...



Welcome to the User Home Page

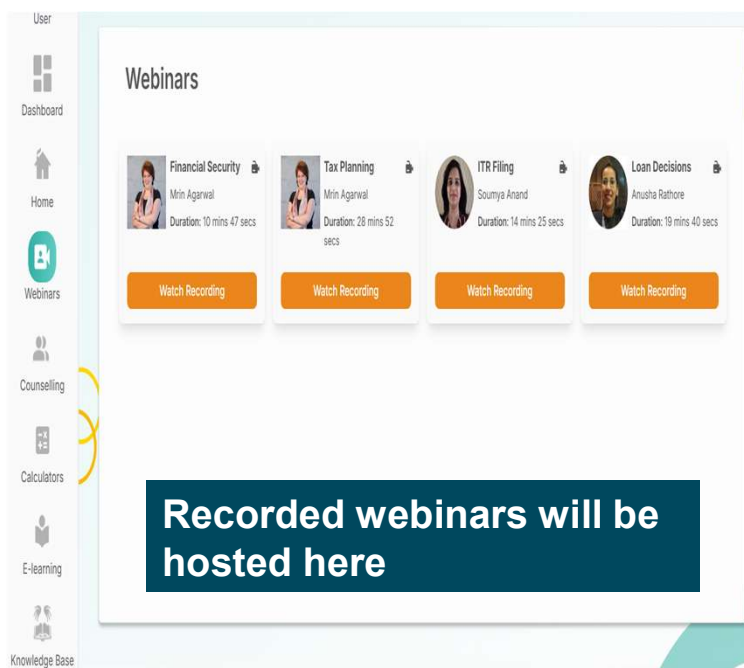
Ask your queries here

Start any journey

Take a quiz



Pre Recorded Webinars



The screenshot shows a user interface for 'Webinars'. On the left is a vertical navigation menu with icons for User, Dashboard, Home, Webinars, Counselling, Calculators, E-learning, and Knowledge Base. The main content area is titled 'Webinars' and displays four webinar cards:

- Financial Security**: Min Agarwal, Duration: 10 mins 47 secs
- Tax Planning**: Min Agarwal, Duration: 28 mins 52 secs
- ITR Filing**: Soumya Anand, Duration: 14 mins 25 secs
- Loan Decisions**: Anusha Rathore, Duration: 19 mins 40 secs

Each card has a 'Watch Recording' button. At the bottom of the main content area, a dark blue banner reads: **Recorded webinars will be hosted here**.

Knowledge Base



The screenshot shows a user interface for the 'Knowledge Base'. On the left is a vertical navigation menu with icons for Home, Webinars, Counselling, Calculators, E-learning, Knowledge Base, Employee Handbook, and Help. The main content area is titled 'Knowledge Base' with the subtitle 'Learn, Explore, Take Control of Your Finances'. Below this is a descriptive text: 'Our Knowledge Base is your go-to library for all things personal finance. Explore topics that matter - from taxes and insurance to gold, investing and smart borrowing - all in one place'. There are three tabs: 'Categories' (selected), 'Finguide', and 'Blogs'. Below the tabs is a grid of 18 topic icons:

- Alternate Investments
- Banking and PO
- Budgeting
- Children's Education
- Digital Fraud
- Emergency Fund
- Financial Documents
- General Insurance
- Gold
- Life Insurance
- Loans & Credit cards
- Mutual Funds
- Pension Schemes
- Quick Solutions
- RSI / FSP
- Stocks
- Taxation
- Wills & Nominations



1 : 1 Counselling:

Counselling Services
Get expert guidance

Receive honest financial guidance in a safe, no-pressure space

A personalised, one-on-one 45-minute discussion about your finances with an experienced and knowledgeable financial expert. Confidential, unbiased information and insights, with no sales agenda.



- General**
 - Concrete and clarity on existing investments
 - Expense and debt management
 - Tax saving ideas
 - Education, if any on investment products
 - Simple ideas around goal setting
- Included**
 - Sale of investments / Insurance products
 - Type or scheme / stock recommendation
 - Creation of Financial Plan
 - PMIS, Advisory services, banking services, financial paperwork etc

[View All Counsellors](#)

Disclaimer
Finsafe is offering the financial counselling service through certified financial planners. The purpose of the Financial Counselling is to help answer queries on personal finance of individuals. This is solely meant for education purposes. There is no guarantee that goals of the individual will be achieved. Finsafe India shall not be liable under or in connection with this disclaimer or any related content for:

- Loss of income
- Loss of financial profits or contracts - business interruption
- Loss of the use of money or anticipated savings - loss of inheritance
- Loss of opportunity, liquidity or capital appreciation
- Loss of savings over a long period of time or any related or consequential
- Loss or change of any tool, benchmark setting and selection caused by loss (including negligence) breach of contract or otherwise

Click On "View All Counsellors"
Book expert counselling sessions on financial, debt, legal, insurance, stock portfolio, investment portfolio etc...

Ajai Ravi Investment Expert CFP 12 years experience Bengaluru Wed, Thu, Fri 2:00pm - 4:00pm Book Now	K Nagaraja Investment Expert CFP 10 years experience Davanagere Mon, Tue, Wed, Thu, Fri, Sat 3:00pm - 5:00pm 10:00am - 12:00pm Book Now	Vikram Aralikatty Investment Expert CFP 5 years experience Bengaluru Mon, Wed, Thu, Fri, Sat 10:00am - 12:00pm Book Now	Vanitha C Krishnan Investment Expert CFP 10 years experience Bengaluru Mon, Tue, Wed, Thu, Fri, Sat 2:00pm - 6:00pm Book Now
Sulabh Chhabra Investment Expert CFP 10 years experience Gurgaon Sat 11:00am - 3:00pm Book Now	Mahendra Nayak M Income Tax and Tax Management Expert CFP 10 years experience Bengaluru Mon, Wed, Fri 12:00pm - 1:00pm Book Now	Ravi Kumar Achar Investment Expert CFP 13 years experience Bengaluru Mon, Wed, Fri 4:30pm - 6:00pm Book Now	Phani Kumar I S Investment Expert CFP 16 years experience Bengaluru Mon, Tue, Wed, Thu, Fri 3:00pm - 6:00pm Book Now
Pareesh Ashara Investment Expert CFP 16 years experience Bengaluru Sun, Mon, Tue, Wed, Thu, Fri, Sat 11:00am - 1:00pm Book Now	P Ganesh Investment Expert CFP 25 years experience Mysore Sun, Mon, Tue, Wed, Thu, Fri, Sat 11:00am - 1:00pm Book Now		

• Choose the counsellor of your choice from the list

Book Your Session

First Name* enter first name Last Name* enter last name

Email* enter email

Phone number* enter phone number

booking date Timings* select timings

Topic of discussion

by booking, you are confirming that you have read and agree to the website [terms and conditions](#)

₹1000 + Taxes [Proceed to Pay](#)

• Provide booking details. Counselling will be done via MS TEAMS



Calculators:

Calculators

Search by name or specialization

<p>Goal Planning Calculator</p> <p>Calculate how much you need to save to achieve your goal?</p> <p>Popularity count: 51</p>	<p>SSY Calculator</p> <p>Calculate to find out how much amount you will get on maturity of the scheme.</p> <p>Popularity count: 14</p>	<p>EPF Calculator</p> <p>Use the EPF calculator to find how much have accumulated in your EPF account.</p> <p>Popularity count: 8</p>
<p>PPF Calculator</p> <p>Calculate to find out how much amount you would have accumulated at the end of the 15 year PPF term</p> <p>Popularity count: 5</p>	<p>SIP Calculator</p> <p>Calculate how much you need to save.</p> <p>Popularity count: 12</p>	<p>SWP Calculator</p> <p>Calculate your final amount with Systematic Withdrawal Plan.</p> <p>Popularity count: 5</p>
<p>HRA Calculator</p> <p>Calculate your House Rent Allowance</p> <p>Popularity count: 6</p>	<p>Old Vs New Tax Regime Calculator</p> <p>Should you stay in the old tax regime or switch to the new tax regime to pay least tax?</p> <p>Popularity count: 15</p>	<p>Home Loan Interest Calculator</p> <p>Calculate your home loan EMI</p> <p>Popularity count: 5</p>
<p>Human Life Value Calculator</p> <p>The Human Life Value (HLV) Calculator helps you identify your life insurance needs on basis of income expenses, liabilities and investments and secure your family's future.</p> <p>Popularity count: 6</p>	<p>Retirement Planner Calculator</p> <p>Helps you plan for retirement corpus based on your current expenses.</p> <p>Popularity count: 5</p>	<p>Buy Vs Rent Calculator</p> <p>Should you buy or stay on Rent Calculator</p> <p>Popularity count: 7</p>
<p>Rolling returns Vs Category returns</p> <p>Calculate the returns of your mutual fund investment Vs-avis the average returns of the same category.</p> <p>Popularity count: 10</p>	<p>Rolling Returns Vs Benchmark</p> <p>Calculate the returns of your mutual fund investment Vs-avis the average returns of the same category.</p> <p>Popularity count: 5</p>	<p>Mutual Fund Portfolio Overlap</p> <p>Check the percentage overlap of portfolio between two funds in the same category.</p> <p>Popularity count: 7</p>
<p>Mutual Funds Swp Calculator</p> <p>Use the SWP calculator to check the returns of systematic withdrawal from your mutual fund scheme and for how long the corpus would last</p> <p>Popularity count: 6</p>	<p>NPS Calculator</p> <p>NPS helps build a secure retirement corpus with flexibility and tailored investment options. See how choosing between Active choice and Auto choice impact Retirement corpus</p> <p>Popularity count: 65</p>	

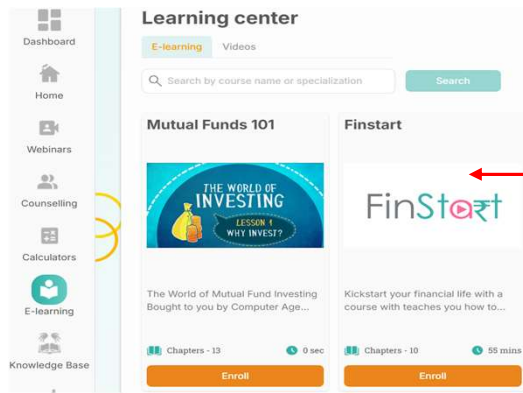
Calculators such as :

- Goal Planning Calculator
- EPF / PPF Calculator
- Old vs New Tax Regime Calculator
- Retirement Planner Calculator
- NPS Calculator

And many more...

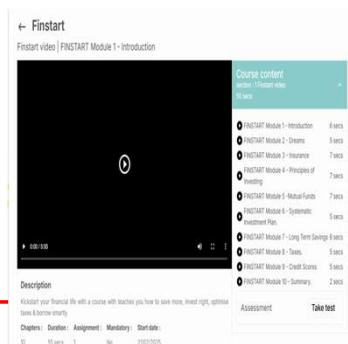
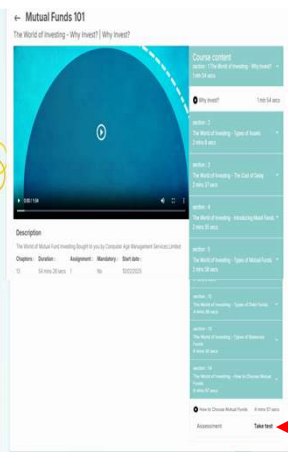
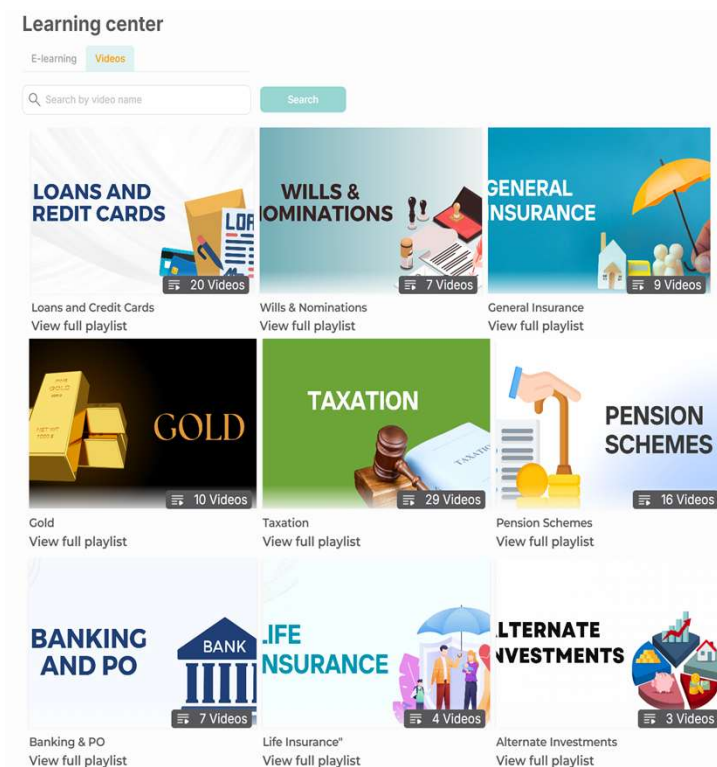


E-Learning Centre: Beginners / Mutual Fund etc



Click on Enroll to view the courses

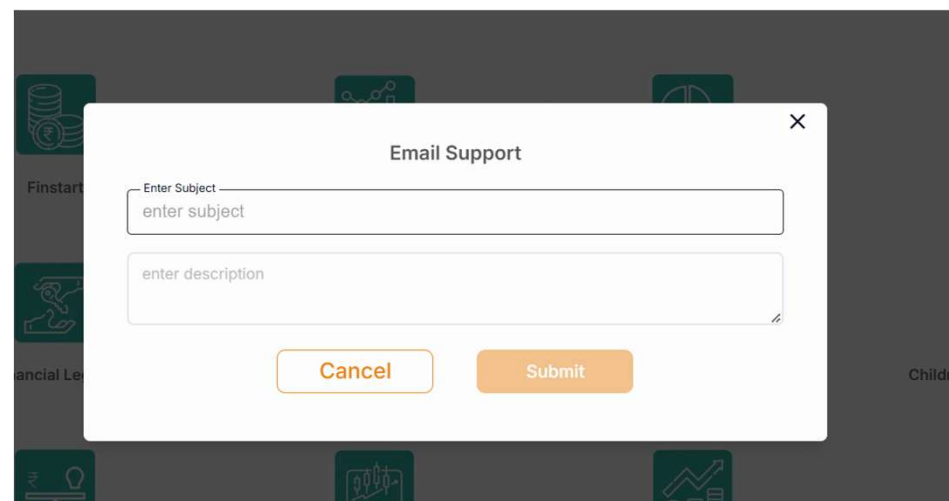
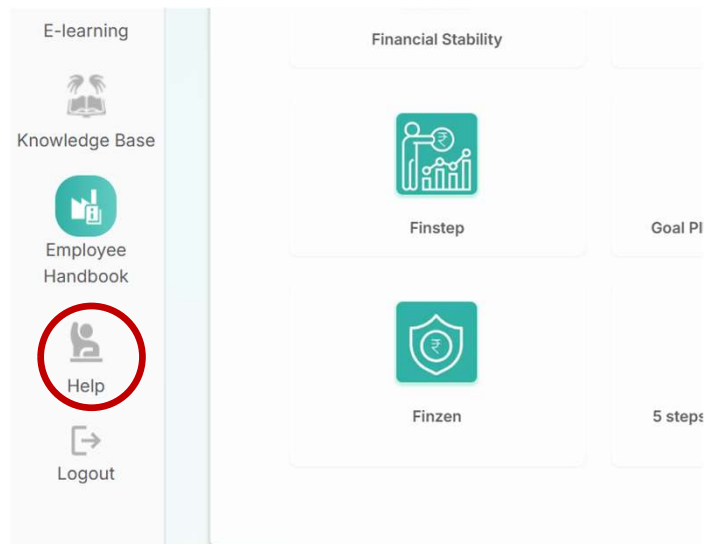
Byte sized Videos



Take Assessment test once you view the course



Help Desk:



Submit your queries, and you will receive a response within 24 hours.



Thank you

For further enquiries, feel free to contact at:

Email to : emailchat@finsafe.in

