

	Basic	DIY+	Platinum	Priority
Comprehensive Financial Plan	Do-it-Yourself through Financial Planning Tools	Do-it-Yourself through Financial Planning Tools	Prepared by our Advisory Team	Prepared by a dedicated by a dedicated Advisor
Track Family Portfolios	No	Yes	Yes	Yes
Advice for Family Members	NA	NA	Advisory team will provide advice to your family members as required.	Advice will be given by your personal finance coach to all your family members.
Your Queries Answered By	myMoneySage Support	myMoneySage Support	Advisory Team	Your personal coach
Money Manager	Can add up to 5 auto-populate/statement upload accounts	Can add up to 30 auto- populate/statement upload accounts	No limit on the number of accounts	No limit on the number of accounts
Auto-mode Expense Tracker	Available	Available	Available	Available
Reports	> Consolidated Family wealth report > MF Transaction reports > MF Portfolio Account Holdings Reports	> Consolidated Family wealth report > Capital Gain/ Loss reports > MF Transaction reports > MF Portfolio Account Holdings Reports	> Consolidated Family wealth report > Capital Gain/ Loss reports > MF Transaction reports > MF Portfolio Account Holdings Reports	> Consolidated Family wealth report > Capital Gain/ Loss reports > MF Transaction reports > MF Portfolio Account Holdings Reports
Portfolio Analysis	No	Asset class-wise, Sector-wise and Return-wise break up of your portfolio	Asset class-wise, Sector-wise and Return-wise analysis of your portfolio by Advisory team	Asset class-wise, Sector-wise and Return-wise analysis of your portfolio by Personal Finance Coach
Portfolio Execution	Do it Yourself	Do it Yourself	Execution support by myMoneySage Support	Execution support by myMoneySage Support
Personal Finance Alerts	No	E-mail and SMS alert facility for all important payments due, renewals and maturity.	E-mail and SMS alert facility for all important payments due, renewals and maturity.	E-mail and SMS alert facility for all important payments due, renewals and maturity.
Document Storage	No	Complimentary high security storage facility to store your important documents.	Complimentary high security storage facility to store your important documents.	Complimentary high security storage facility to store your important documents.
Free Talk time with Advisors	No	1 hour/quarter	Advisory team is available on call.	Dedicated Advisor is available on Priority.