

# Asset Allocation Advisor

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

## Background

Provides asset allocation guidance — an equity / debt / gold-and-others split by risk profile or goal, with the rationale for each and a rebalancing approach (when and how). Use this to allocate a portfolio sensibly across assets. For selecting the actual funds within each bucket use the MF Recommendation Framework.

## Purpose of this tool & output

Allocate across assets for goals and risk

## How the output is used

Use the advisor to allocate across assets for goals and risk, and to rebalance over time.

## Who should vet it

An investment advisor, to confirm the allocation for the client risk profile.

## Important cautions

AI-generated guidance, not investment advice; personalised advice needs a SEBI-registered adviser.

## Companion documents

- Financial Plan Builder
- Goal-Based Planning Calculator
- Risk Profiling Questionnaire
- Investment Tax Planning
- Estate & Succession Planning
- RIA Registration & Compliance

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.