

Succinct FinTech Services Private Limited

SEBI Registered Investment Advisers Registration No. INA200008705

About the Company

Succinct FinTech Services Private Limited is a company registered under the Companies Act, 2013 vide Corporate Identification Number (CIN) U93000KA2011PTC059619 and registration number is 059619. Succinct FinTech is also a Registered Investment Adviser (RIA) under Securities and Exchange Board of India (Investment Advisers) Regulations, 2013 vide Registration No. INA200008705 having its registered office at No 4, RCC Chamber, 2nd Floor, 30th Cross, 4th T Block Jayanagar, Bannerghatta Road Extension, Bangalore, PIN: 560041, Karnataka, India.

The Principal Place of Business is: No 4, RCC Chamber, 2nd Floor, 30th Cross, 4th T Block Jayanagar, Bannerghatta Road Extension, Bangalore, PIN: 560041, Karnataka, India. Succinct FinTech has no branch as of now.

Operations

1. Succinct FinTech charges the fees for Preparation of Financial Planning Report, Investment advisory services and the amount paid by subscribers is not for any investments, insurance, deposits or demat purpose.
2. Succinct FinTech or any of its executives do not execute any Trades/Investments on customer's behalf.
3. For Refunds, you can read the Refund Policy in the agreement signed by you with Succinct FinTech
4. Investment in the Mutual Funds, Direct Equity Stocks are subject to market risk and your capital may be at risk. Succinct FinTech or any of its executives neither promise nor guarantee any pre-specified profits.
5. Succinct FinTech or its employees would never call you until you ask/request for any services and contact Succinct FinTech to call you. So, beware of any unsolicited calls in the name of Succinct FinTech, if you have not requested for the call back. You should report such calls to Succinct Fintech Support team at +91-80-41123767 or email at clientservices@succinctfintech.com.
6. Succinct FinTech would never send any SMS recommendation or investment tips. So, if you receive any SMS, Call or Mail regarding any such tips, kindly report to clientservices@succinctfintech.com or call at +91-80-41123767.

Disciplinary History

Succinct FinTech served a show cause notice on July 11, 2019, by the regulator SEBI for acting as an Investment Advisor before applying for the Certificate of registration with SEBI as an Investment Advisor and in a penalty of Rs.10 Lacs was imposed by the Adjudicating Officer on August 30, 2019.

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Registration No. INA200008705

Date: January 01, 2021

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(Type of Registration- Non-Individual, Validity of Registration- Oct 30, 2017 - Oct 29, 2022)

Address: No 4, RCC Chamber, 2nd Floor, 30th Cross, 4th T Block Jayanagar, Bannerghatta Road Extension,
Bangalore, Karnataka, 560041

Contact No: +91-80-4112-3767, Email: clientservices@succinctfintech.com

SEBI regional/local office address - Jeevan Mangal Building, Hayes Rd, off, Residency Rd, Shanthala Nagar,
Ashok Nagar, Bengaluru, Karnataka 560025 Tel : +91-080-2222-2262

Principal Officer: Mr. Soubhagya Kumar Patra, Contact No: 91 99869 91220, Email:
soubhagya.patra@succinctfintech.com