

VISION -To become leading Financial Advisory company that helps to maintain lifestyle of everyone from a common man to a CEO, through customized financial planning.

MISSION- To provide need based financial planning through detailed analysis of individual.

Extending our services and knowledge to our clients with complete transparency.

Keeping the team continually updated on various products available in industry and following ethical code of conduct.

BORN AS A AGENT

My father My mentor

Started working as a general insurance advisor at the age of 19 years

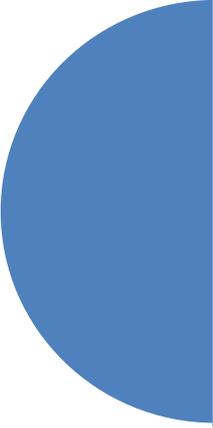
Being a extrovert and fond of talking with people and sharing their views helped me in my business.

Overcoming the struggle of explaining the client the concept, answering their queries and misgivings, overcoming their inhibition.

Under the guidance of my father who was also my mentor and hard work i started realizing my goals by also working as a corporate insurance consultant at Auto Hangar India Pvt Ltd.

Expanding into loan sector, mutual fund and Qualified for MDRT (USA), COT (USA) past several years.

One of the youngest CLIA (chief life insurance advisor) in my division through which i can recruit advisor and help them with their own startup , proud to be standing here with 2000+ clientele.



What is CFP



Need for becoming a CFP

Expanding the business and developing it in the fast moving world of finance.

MOTIVATION FOR BECOMING A CFP



Planning for this exam since many years but because of business schedule and delays never got the opportunity to go ahead with the studies and appear for the exams.

Motivated by Mr Keyur Shah classes and through telephonic conversation regarding the same

Teaching style, clear straight fundamental, technical analysis skills and 5step module has made it very easy and clear to go about with the studies.

Technical skills has also helped me in my business dealings.

MOVING TOWARDS SUCCESS



Instilled the confidence of appearing for the exams and thus helping to take next step towards realizing the dream of becoming a CFP and widen the horizon and prospect of the business.