❖ Our Vision: Holistic Wealth Creation.

❖ Our Mission: Turn Savers into Investors.

❖ Our Motto: Ethics First, Business Second.

KRISHNA CHOKHANI HUF

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PROFILE

Mr. Krishna Chokhani is a Certified Financial Planner ™ & an Accounting Technician, conferred by ICAI with a vast experience of 15 years in the mutual fund advisory space.

He is an LIC Agent since start of his career of 20 years & Chairman Club Member qualified for the Million Dollar Round Table (MDRT-USA) for 10 years straight and counting & an expert in the field.

General Insurance Agency is another business vertical under his dynamic leadership covering health and motor insurance.

CONTACT

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FEW MILESTONES

- ✓ Active Families 1200+
- ✓ Assets Under Advice 130+ Cr
- ✓ Life Risk Covered 190+ Cr
- ✓ Health Risk Covered 65+ Cr

ABOUT OUR ORGANIZATION

Our organization is an ancestral business running down 3 generations, protecting & creating wealth for its client's since decades. Our milestones are a reflection of trust, commitment & values that are deeply ingrained in our relationship with our clients.

Our organization prides itself in being an ethically managed, quality focused & customer centric organization backed by strong domain knowledge & cutting-edge technology platform for the delivery of sustainable value to our clients.

HIGHLIGHTS

Clientele
Business owners, HNI's, professional's, lawyer's & doctor's, corporate client's, trusts spread across domestic as well as international geographies such as USA, Canada, Singapore, Dubai, Australia etc.

Emphasis on Life Cycle Financial Planning
Addressing financial planning across every life stage by inculcating goal based financial planning, thus being your financial partner from day one.

Ease of Investment's & Claim Experience
Our state-of-the-art E-Wealth A/c supported by an able & dedicated Team to provide you with exclusive tailored products & a truly available claim handler for providing you assistance round the clock.

SERVICES OFFERED:

1. Wealth Management
2. Portfolio Review & Advisory
3. Goal Based Financial Planning
4. Insurance (Life & General)
5. Loan Against Securities
6. Tax Planning