Wealth Creators

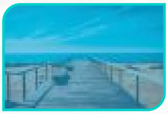
Financial Advisors

COMPANY PROFILE

Wealth Creators Financial Advisors was established with a mission of creating financial awareness & helping people from various strata of the society to evaluate and streamline their individual financial needs with also an intent of protecting them from making irrational financial decisions. We specialize in providing unbiased financial planning solutions by giving utmost priority to the interest of the client. We help clients meet their important life goals by preparing a customized Comprehensive Financial Plan and also by providing help in its implementation. We follow a very robust mechanism to derive solutions for every financial problem. We believe in building strong trust based relationship for a lifetime as we look beyond monetary benefits and ensure that we deliver the whole organisation for the benefit of our clients. That is why, the majority of our clients are referrals from our existing satisfied clients.

OUR MISSION

Improving client's financial lives through meaningful intervention.



OUR VISION

To be the most trusted partner in client's journey towards financial freedom

OUR VALUES

Trust
Transparency
Integrity

WHY CHOOSE US

OUR COMMITMENT

When we work with you, we roll up our sleeves and become your personal finance manager. Our success is measured by the success of your financial life. That's why we invest whatever resources are needed to get and keep your financial life on the right track.

OUR EXPERIENCE

We know the financial challenges you face today. Our Financial Advisors have got the requisite knowledge and experience to tide you over any of your financial problems by working with you closely and identifying your true needs and aspirations.

OUR UNIQUENESS

We are SEBI Registered Investment Advisors acting in a fiduciary capacity towards you with the highest ethical standards. Our advice is offered after thorough analysis and taking into account available alternatives based on your risk profile and suitability.

OUR SERVICES

WHAT WE CAN OFFER YOU

Each person's financial life is unique. One-size-fits-all approaches will never help you reach your financial goal. Customized solutions benefit you by exploring avenues pertaining to your individual situation. That's what we deliver to you.

Financial Planning & Investment Management: Our Financial Planning service helps in the proper management of your finances. It allows you to understand how each financial decision you make affects other areas of your finances. it is important to study and understand all your financial circumstances elaborately, like Income, Expenses, Loans, Assets, Insurances, Investments and Financial aspirations and insecurities. This service involves all aspects of a person's financial life and is a holistic approach to managing financial goals like; Emergency fund, Retirement, Child's future, Holiday home and many more.

Will Planning: We offer one of the simplest means of guaranteeing peace of mind for both you and your loved ones. This legal document allows you to make decisions on who will administer your estate and distribute your assets on death. In the absence of a will, the person is said to have died "intestate" and state laws will determine how and to whom the person's assets will be distributed. A Will is an instrument that allows you to put down on paper your final wish of how your wealth is to be distributed to the people who matter to you.

Debt Management: Our unique service of Debt management helps you in reviewing and analysing your all debts like: Home loan, Personal Loan, Car Loan, Business Loan etc. We help you in exploring avenues for consolidating and restructuring the existing debts. Our team helps you in advising on low interest rate products to suit your specific need and also, guide you to talk to your financial institutions to negotiate the terms for loans.

Insurance Advisory: We believe that protecting yourself, your dependents and your wealth with all possible risks is an important aspect of wealth protection strategy. We help you in understanding your various insurance needs, providing an unbiased recommendation of appropriate product selection. Our strong review process helps you in reviewing and analysing your existing insurance policies and re-aligning them to match your needs.

10 Reasons why you need a financial plan?

- To manage CASH FLOWS
- To manage DEBT efficiently
- Streamline INVESTMENTS
- Invest in RIGHT financial products
- Set the ASSET ALLOCATION right
- WEED OUT inefficient financial products
- To INSURE yourself optimally
- Set SMART financial goals
- Regular SAVINGS
- To have BLUEPRINTS to achieve financial goals

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