

A close-up photograph of a hand holding a stack of gold coins. The hand is positioned in the center of the frame, with the fingers gripping the stack. The coins are stacked vertically, and the top coin is slightly offset. The background is a soft, out-of-focus light color. The text 'FINVISE INDIA' is overlaid on the image in a large, black, serif font.

FINVISE INDIA

(FINANCIAL ADVISE FOR THE WISE)

# Our mission

To develop the financial resources of Indian families and to fulfil their savings, investment, insurance, housing, taxation, pension and estate planning needs.

For you, this means we are here to help you think about your financial goals and provide you with the right financial instruments to achieve them.

For us, this means that you always come first.

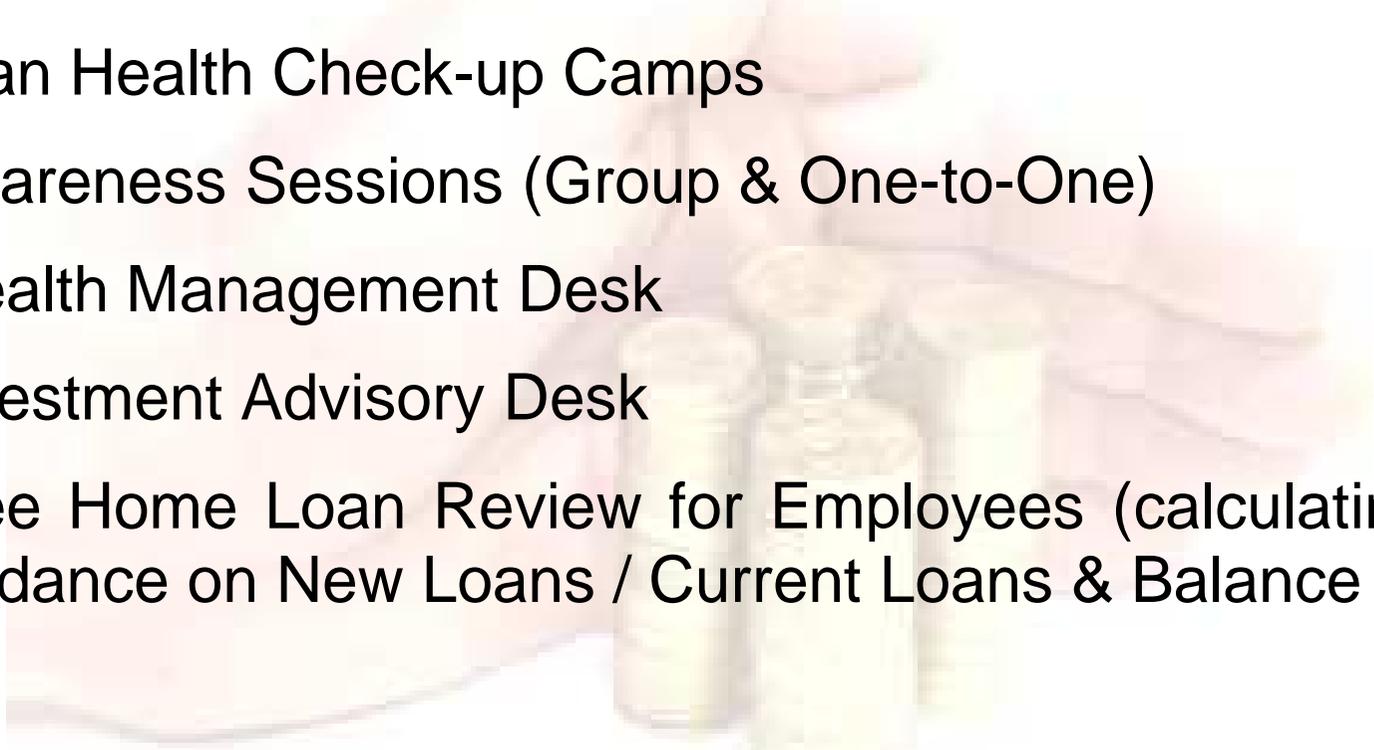
# Who we are

- Independent advisors and distributor of financial products, real estate & loans
- Vast Industry experience with comprehensive knowledge of financial products, real estate & mortgage
- Working with Business Class, Professionals, Self Employed & employees of Corporates such as GE Capital, Evalueserve, Simon Carves, Metso Minerals, Canon, McKenzie, Genpact, Cairn India, Philips, Punj Lloyd, Cargill, Hughes, etc.

# What We Do

- Financial Planning
- Mutual Fund Advisory – Equity, Debt & Hybrid
- Insurance Advisory – Life & General
- Tax Planning & Filing
- Estate Planning – Wills & Wealth Transfer
- Real Estate (Original bookings/Resale/Leasing)
- Wealth/Portfolio Management & Advisory
- Home loans (New Loans/Balance Transfer)
- SME Loans
- Project Financing
- Documentation Management

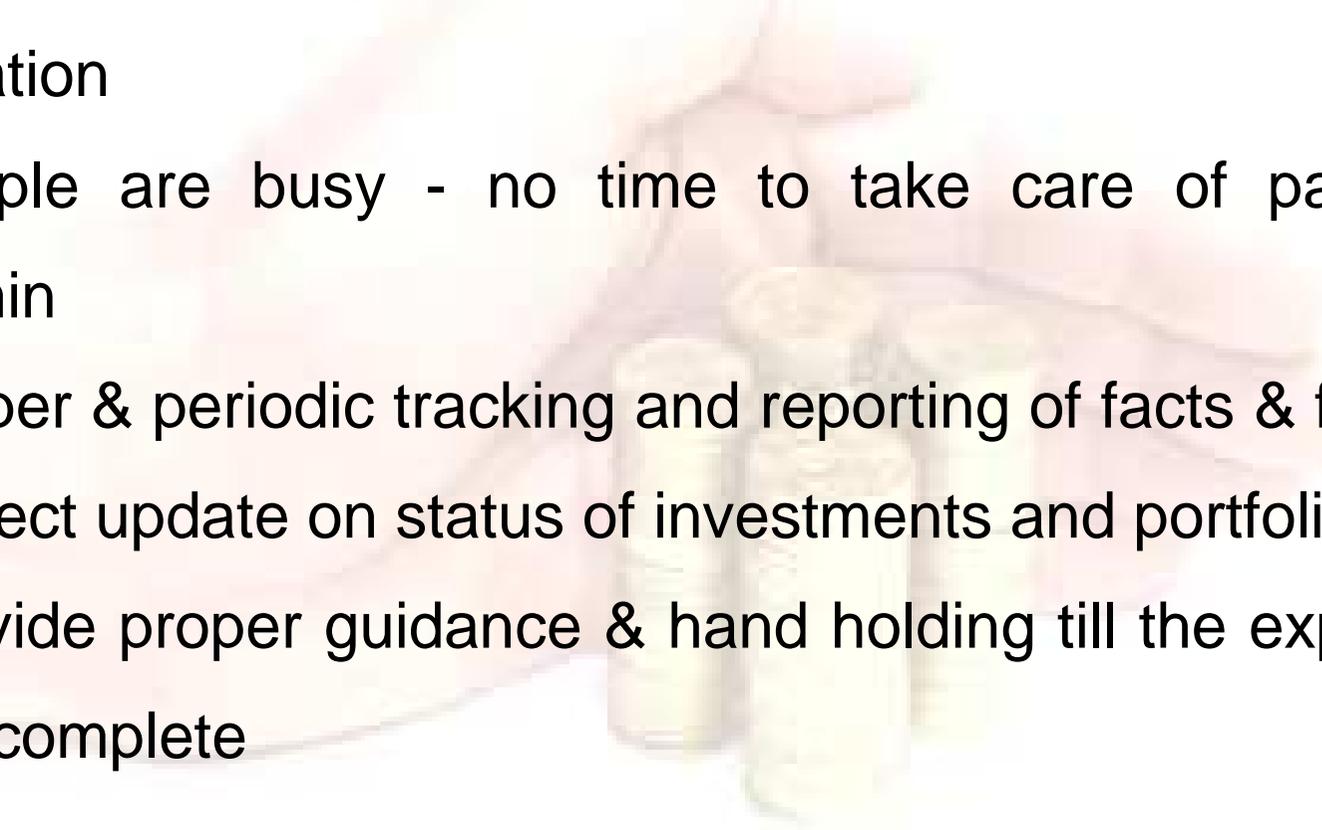
# Our Activities at Corporates

- Real Estate & Financial Education Seminar Series
  - Loan Health Check-up Camps
  - Awareness Sessions (Group & One-to-One)
  - Wealth Management Desk
  - Investment Advisory Desk
  - Free Home Loan Review for Employees (calculating eligibility, guidance on New Loans / Current Loans & Balance Transfers)
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# Why Us

- We are independent financial & real estate advisors – We help you implement and achieve your financial goals
- We are recognized expert – many large corporate customers in NCR and India utilize our services.
- We are working to help you with customized solutions such as:
  - **Financial planning** – how to prepare for a better life in the future
  - **Loan Health Review** – New Loans/Current Loans & Balance Transfers
  - **Real Estate Planning** – how to manage your realty portfolio i.e. plan entry & exit.

# Why is our service important?

- We will share good financial habits that will lead to wealth creation
  - People are busy - no time to take care of paperwork and admin
  - Proper & periodic tracking and reporting of facts & figures to give correct update on status of investments and portfolio
  - Provide proper guidance & hand holding till the expected task is not complete
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- A faint, semi-transparent background image of a hand holding several gold coins, positioned behind the list of bullet points.

# Benefits

We offer our privileged clients Freedom from worries, no matter what the state of economy or markets

- Offer Solutions after understanding person's short and long-term goals
- Describe strategies to achieve them
- Identify obstacles that might need to get eliminated

**No plan = Unintended consequences**

# Why should you use our services?

## EXPERTISE

We are recognized as an expert

*You will always get answers* to your complex and unique questions

## INDEPENDENT ADVICE

We are not tied to any one company – best way to be customer centric

*You always get honest advice* at all times, no conflict of interest

## ONE-STOP SHOP

Different products from different companies, so customers have best choice

*You don't have to run around*, we do the running for you

## PARTNERS

LIC, HDFC, ICICI, SBI, Birla Sunlife, Kotak, Standard Chartered, DLF, IREO, & (Many More)

*You get world class products* and India's leading financial brands



**Contact us for**

**Real Estate | Home Loans | Financial Planning | Investments | Wills**

**Email: [contact@finviseindia.com](mailto:contact@finviseindia.com)**

**TEL: +91-9582250638**