



INVESTSATHI

Your Trusted Financial Partner

ABOUT INVESTSATHI

Corporate & Retail Financial Solutions
Investment • Insurance • Wealth Management



AMFI Registered Mutual Fund Distributor (MFD)



IRDA Certified Insurance Advisor



Business Associate -
Prudent Corporate Advisory Services Ltd.

Who We Are



INVESTSATHI

Company Overview

InvestSathi is a trusted financial services platform dedicated to financial planning, wealth management, and advisory solutions for corporate and retail clients. Our mission is to empower our clients to make informed financial decisions and achieve their financial goals.



Financial Planning

Personalized planning to meet life goals, build wealth and create a secure future.



Wealth Management

Well-structured strategies to help grow and safeguard your wealth.



Advisory

Advisory and intermediate services in advisory and distribution.



Your Partner for Financial Growth.

Our Vision & Mission



OUR VISION

To become a leading financial partner that makes financial planning simple, transparent, accessible, and goal-oriented.



OUR MISSION

Protect today. Invest wisely.
Build tomorrow.



Our Philosophy



Understand



Plan



Invest



Protect



Review



Grow

“

The right financial plan today
builds a secure and independent tomorrow.

”



INVESTSATHI

SMART INVESTMENT. SECURE FUTURE.

What We Offer

We offer a wide range of solutions across Investment, Insurance and Wealth Management to help you achieve your financial goals.



INVESTMENT SOLUTIONS



Mutual Funds



SIP



Stocks



Bonds



Fixed Deposits



NPS



IPOs



Smallcase



PMS



AIF





INVESTSATHI

— SMART INVESTMENT. SECURE FUTURE. —

Investment Solutions

A wide range of investment options to help you grow your wealth and achieve your financial goals.



INVESTMENT SOLUTIONS



Mutual Funds



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INVESTSATHI

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Insurance Solutions

We provide comprehensive insurance solutions to protect you, your family and your business from life's uncertainties.



INSURANCE SOLUTIONS



Life Insurance



Term Insurance



Health Insurance



Business Insurance



Corporate Insurance





INVESTSATHI
— SMART INVESTMENT. SECURE FUTURE. —

Our Approach



Understand

We understand your goals, needs and financial situation.



Analyze

We analyze your current portfolio, insurance and financial position.



Plan

We create a goal-based strategy according to your risk profile.



Implement

We help you execute and implement the right solutions.



Review

We regularly review your portfolio and financial goals.



Grow

We work with you for long-term financial growth.



INVESTSATHI

— SMART INVESTMENT. SECURE FUTURE. —



WEALTH MANAGEMENT



Financial Planning



Wealth Creation



Retirement Planning



Child Education Planning



Portfolio Review



Goal-Based Planning



Tax Planning



Asset Allocation



Why Choose **InvestSathi**?

- ✓ **Goal-Based** Approach
- ✓ **Personalised** Financial Solutions
- ✓ **Wide Range** of Investment Options
- ✓ **Insurance & Protection** Solutions
- ✓ **Regular** Portfolio Review
- ✓ **Transparent & Ethical** Advice
- ✓ **Long-Term** Relationship
- ✓ **Client-Centric** Service



Who We Serve



Salaried
Professionals



Business
Owners



Families



First-Time
Investors



Senior
Citizens



Corporate
Clients



HNI / Wealth
Clients



NRIs



Professionals



Students

Our Core Values



Trust

We build relationships based on trust.



Transparency

We believe in clear, simple and honest communication.



Discipline

We stay disciplined in investing and financial planning.



Responsibility

We understand our responsibility towards your goals.



Service

We are with you at every step of your financial journey.



Founder & CEO

Kiranpal Singh



14+ Years of Experience in
Wealth Management, Mutual Funds,
Insurance & Financial Planning



AMFI Registered Mutual Fund Distributor



IRDA Certified Insurance Advisor



Investment & Retirement
Planning Specialist



InvestSathi.in
— Financial Services —



www.investsathi.in



Sahi Planning,
Behtar Kal! 🌱



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Our Commitment

At InvestSathi, we believe financial success is not about **earning more**, it is about



Earning



Saving



Protecting



Investing



Growing



Achieving

Your Goals. Our Guidance. Better Future Together.



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Let's Connect



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