



AGRASEN FINSERV PVT. LTD.

23 +

YEARS OF SERVICES

Wealth Management Group





Agrasen Finserv Private Limited is a leading Wealth Management firm providing comprehensive research backed services across multiple asset classes including Equity, Mutual Funds, Fixed Income, Alternate investments, Succession Planning, Life and Health Insurance, Loans and Tax Planning.

VISION

To maintain and grow our position as a trusted and reliable partner in wealth creation and preservation.

MISSION

Just like a family doctor, each family needs a financial doctor as well. We work like a Family's personal Chief Financial Officer (CFO) who helps achieve financial wellbeing by ensuring that they accomplish all their financial goals and dreams. We make sure people avoid financial mistakes in their life cycle. We also want to help our clients get the feeling of financial freedom with zero stress around money related issues. This is our little way of making a positive contribution in this world through our professional expertise.





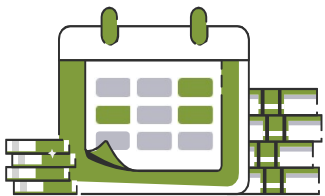
FINANCIAL PLANNING

- *Organizing all the financial and related information*
- *Preparing personal Balance Sheet and Cash Flow Statements.*
- *Goal Based Investment*



MULTI-ASSET CLASS INVESTMENTS

- *EQUITY - Stocks, Futures and Options, Equity mutual funds, PMS, ETFs*
- *FIXED INCOME - Bonds, NCDs, Debt mutual funds, Govt Schemes, PPF, NPS*
- *ALTERNATE ASSET CLASSES - Gold, REITs, INVITs, AIFs, P2P lending, Pre-IPO, Investment in Start-ups*



PROJECT FINANCE ADVISORY

- *HNI IPO Funding*
- *Loan against Shares, Loan against Property, Home Loan, etc.*
- *Business Project Loan, Working Capital Loan, Government Subsidies.*



WILL, TRUST AND SUCCESSION PLANNING

- *Will Drafting*
- *Private Trust*
- *Inter-generational wealth transfer*

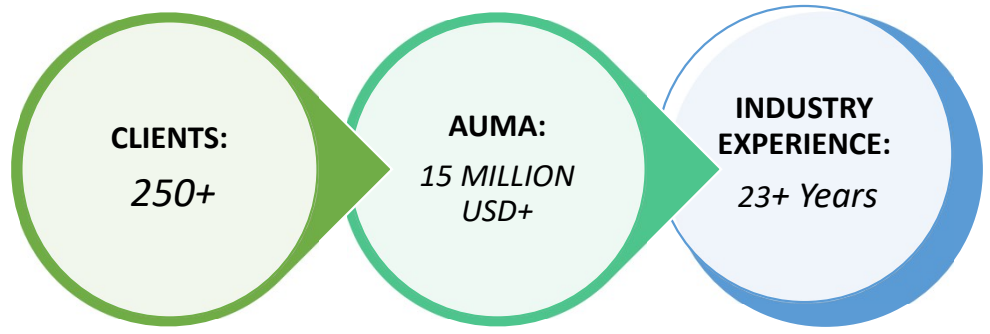


INSURANCE AND RISK MANAGEMENT

- *Life Insurance Planning*
- *Health Insurance Planning*
- *General Insurance Planning*

Manage your wealth & track your portfolio with one single login through Mobile Application and Website





ASSET MANAGEMENT COMPANIES

INSURANCE



P-2-P LENDING



INVESTMENT PARTNERS



PRE-IPO TRADING





- Agrasen Finserv is one of the most reputed Indian Wealth Management firm with more than two decades.
- Strong Research serves as the backbone for our wealth advisors and investment ideas.
- Complete confidentiality and privacy over investments and business affairs.

Agrasen Finserv is known for immense goodwill and trust from its clients.

In depth understanding of different asset classes across multiple market cycles.

Experienced and qualified team of senior Wealth Advisors.

Ability to offer completely independent unbiased advice across Fixed income, Equity, Mutual Fund, derivatives, IPO's, structured products, PMS, Alternative assets.

Capability to bring client access to innovative investment ideas and deals through various Investment partners.

Access to Specialized research and product teams across multiple products

Better positioned to understand the upcoming trend in the market, and take necessary action

Better understanding and connect with Research & Fund management teams of AMCs, which help in taking informed decisions



AADARSH DEORA, CA, CFA, QFPF

CO-FOUNDER - AGRASEN FINSERV PRIVATE LIMITED

He is a qualified Chartered Accountant (2016) and Chartered Financial Analyst Charter holder (CFA-USA-2018).

Previously, he has worked at CARE Ratings Limited as Rating Analyst gaining research experience across different industries and sectors. Thereafter, he gained rich experience working as Wealth Manager at JM Financial Limited advising Ultra High Net-worth Families (Above Rs.30 crore wealth) of Gujarat region across multiple investment asset classes. Overall he has over 6 years of post qualification work experience.



CA ADITYA DEORA

CO-FOUNDER - AGRASEN FINSERV PRIVATE LIMITED

He is a qualified Chartered Accountant since 2013. He is also a Senior Partner at one of the leading Chartered Accountancy Firm named 'Deora Maheshwari and Co.' based at Ahmedabad, Gujarat serving clients across the globe in the field of taxation, book keeping, auditing, project finance, etc. Furthermore, he has over 8 years of experience serving clients in the field of investment advisory and wealth management.



CA ARVIND DEORA

CO-FOUNDER - AGRASEN FINSERV PRIVATE LIMITED

He is a qualified Chartered Accountant since 1998. He is the Founding Partner at leading Chartered Accountancy Firm 'Deora Maheshwari and Co.' based at Ahmedabad, Gujarat. He continues to successfully serve clients across the field of taxation, book keeping, auditing, project finance, etc. He has over 23 years of experience serving clients in the field of investment advisory and wealth management.





Agrasen Finserv Pvt. Ltd. has been registered with AMFI, under registration code *ARN-124583*.



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