****

**Glory Prime Wealth Private Limited – Company Profile**

The company is engaged in financial planning for clients across various investment and insurance products. Company is a registered distributor with SEBI as per the relevant rules and regulations.

**Services:**

* Goal based Investment Planning and portfolio construction
* Risk Profiling & Appropriate Asset Allocation
* Insurance Planning
* Tax Planning
* Regular Portfolio Review & Monitoring

**Products provided:**

* Investments – Mutual Funds, PMS, AIF, Fixed Deposits, Bonds and Debentures, etc.
* Insurance – Life Insurance, Health Insurance and General Insurance
* Others – NPS, Demat Account, etc.

**Business Update:**

* Clients – There are 375+ clients who have done investments
* AUM – Assets Under Management is more than 58crores as on 03 Dec 2022 (42cr+ in Mutual Funds, 15cr+ in PMS, 1cr+ in Fixed Deposits, etc)
* Insurance – Life Insurance policies worth more than 50crores death cover and Health Insurance with more than 1 crore of policy cover have been sourced

**Company Principles:**

* Glory Prime Wealth Private Limited has a strict policy of “CLIENTS FIRST & SERVICE FIRST”. We strive to take every single decision in the best interest of clients.
* We believe SERVICING is atleast as important as SELLING. So, we place utmost importance to service aspects like nominee updations, bank updation, regular statements and review, etc.
* Service aspect is the most crucial area where we have our utmost focus.
* Client specific Risk Profile & appropriate Asset Allocation with portfolio construction is done.
* Focus Is always on pure investments and no speculation is ever done.
* There is no bias towards any particular fund. A lot of thought and data-driven decision are taken while finalizing client portfolio in mutual agreement with client.
* Long Term Wealth Creation – We try to ensure client’s investor returns are same as investment fund returns (by not letting Investor Behaviour affect the returns)

Thank you

Regards,

CA Navin Agarwal, CFA

Founder & CEO

[Navin@gpwpl.com](mailto:Navin@gpwpl.com)

+91 9307099816