



CENTRIC WEALTH[®]
INVESTMENT | INSURANCE

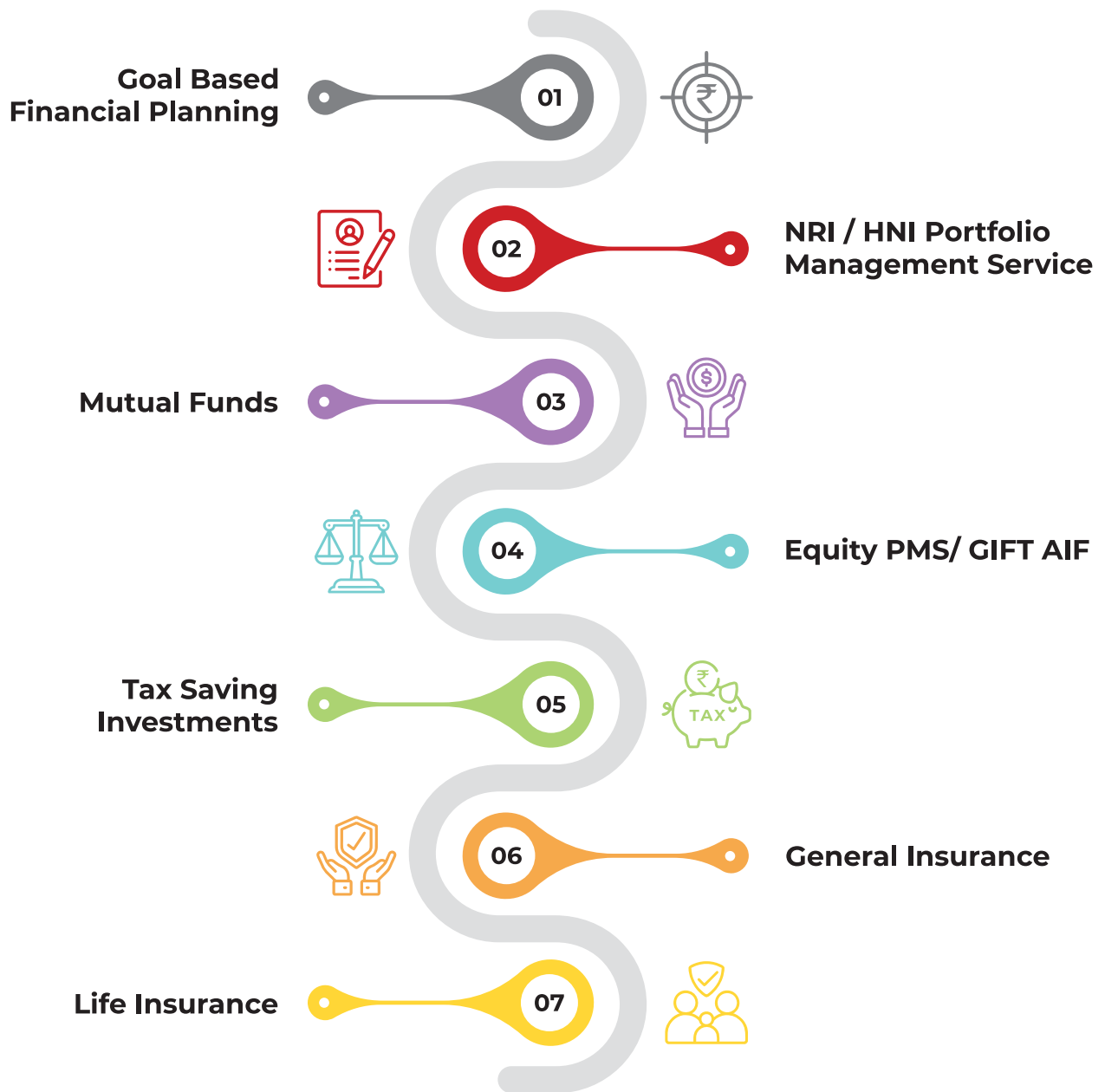
www.centricwealth.in

SECURING TOMORROW

Let's Dive & Swim
outside your limits



Our Expertise



"IT'S NOT HOW MUCH MONEY YOU MAKE, BUT HOW MUCH MONEY YOU KEEP,
HOW HARD IT WORKS FOR YOU, AND HOW MANY GENERATIONS YOU KEEP IT FOR"

ROBERT KIYOSAKI

About Us

Centric Wealth is a Financial Advisory Services Firm. We are registered with AMFI for mutual funds distribution. We are in to complete Financial Planning Services through Mutual Funds, Fixed income Investments, Equity PMS, General Insurance and Life Insurance. Established in 2015, Centric Wealth serves over 500+ individual clients and 300+ family portfolios of Corporates, MSMEs, high net worth families, NRI, individuals and retail clients. Our aim is to provide independent, high quality and customized services. "Maximizing Wealth" is the first and foremost motive of us. We are serving clients from India, USA, UK, Singapore, Portugal and Canada.

Our services are individually designed to meet clients' needs as determined by personal consultations and constant monitoring of their financial goals. Our approach is to counsel individual clients, understand their profile, needs and concerns, build customized financial investment portfolios, and offer a comprehensive selection of investment alternatives that will suit their financial goals.

Our Vision is to become a leader and trusted brand in the Financial Services Sector.

Our Mission is to help our clients to achieve Financial Freedom and Securing their Future. Our USP is that we advise the clients ONLY on the basis of their financial goals and requirements and NOT on the basis of our targets

"We are in top 1% of independent Financial Advisors in India." (In terms of Asset Under Management).

FOR LONG TERM WEALTH
CREATION, TIME IN THE
MARKET IS MORE
IMPORTANT THAN
TIMING THE MARKET.



DISHANK SHAH

Dishank Shah is a Chartered Accountant and Masters in Commerce from Gujarat University. Previously He has worked with Crisil Limited, India's leading credit rating agency as a research analyst. He is specialised in the Financial Planning and Investments Advisory. Since 2015, He is managing investments of more than 75 cr in last 9 years of 300 family portfolios. Aim is to manage at least 1000 family portfolios and investments of more than 500 cr.



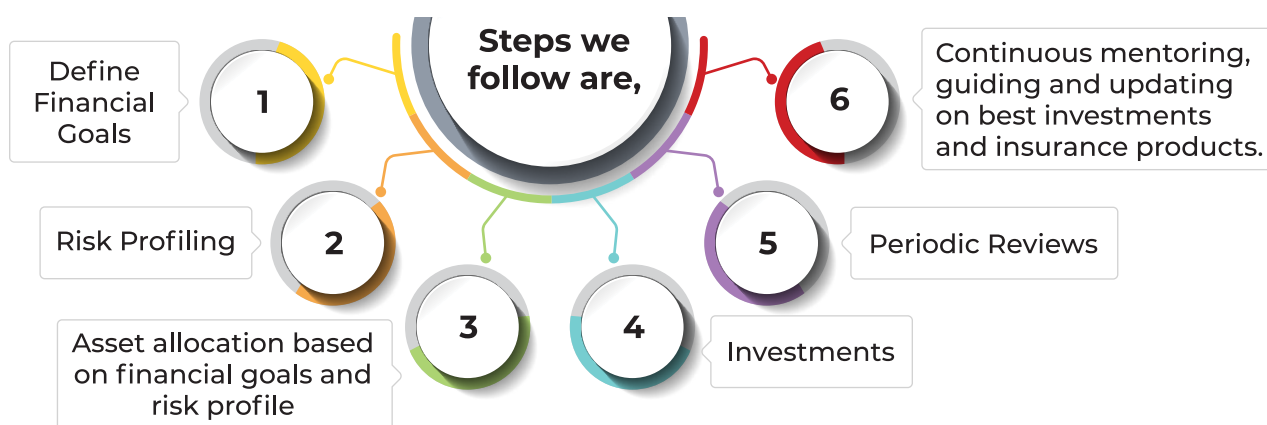
PAYAL SHAH

Payal Shah is a commerce graduate from Gujarat University and since 2020, she is handling the general insurance vertical.

Financial Planning

High Net worth Individuals / Non Resident Indian's financial planning and portfolio management are our specialisation area. We feel privileged to be part of their financial freedom journey.

We follow Goal Based Financial Planning and Asset Allocation approach when it comes to HNI / NRI.



Asset Allocation is the key in Financial Planning.

Basic rule of Investments is "DO NOT PUT ALL YOUR INVESTMENTS INTO ONE ASSET CLASS"

We help with the following investments avenues,



EQUITY MUTUAL FUNDS



FIXED INCOME INVESTMENTS



DEBT MUTUAL FUNDS



GOLD FUNDS



HYBRID MUTUAL FUNDS



EQUITY PMS/ GIFT AIF

WHAT IS FINANCIAL FREEDOM?

"HAVING ENOUGH MONEY TO MAKE DECISIONS OR CHOICES THAT YOU WANT TO MAKE!"

Mutual Funds

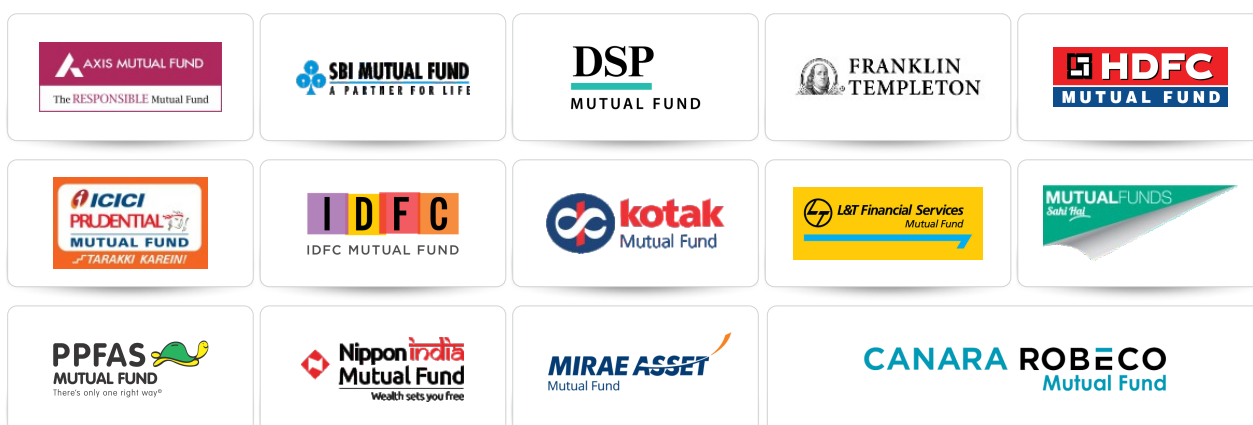
Mutual Funds are among the hottest favourites with all types of investors. Investing in mutual funds ranks among one of the preferred ways of creating wealth over the long term. In fact, mutual funds represent the hands-off approach to entering the equity market. There are a wide variety of mutual funds that are viable investment avenues to meet a wide variety of financial goals.

The AUM of the Indian MF Industry has grown from ₹16.50 lakh crores as on November 30, 2016 to ₹68 lakh crores as on November 30, 2024 more than 4- fold increase in a span of 8 years.

Why Invest in Mutual Funds Through Us

- ▶ Client Centric Approach - Advisory on the basis of client requirements
- ▶ Expertise in selection of mutual fund schemes
- ▶ Best in Class Technology - 100% transactions can be done online
- ▶ Active Tracking of Portfolios - India's top web portal and mobile app (Centric Wealth app available on IOS and android)
- ▶ 9 years of experience with 500+ portfolios (including NRI clients based in USA, UK, Australia, Singapore, Portugal and Canada)
- ▶ Updation on new investments products and mutual fund schemes

🔍 www.centricwealth.in/mutualfund.php



YOU BECOME FINANCIALLY FREE
WHEN YOUR PASSIVE INCOME
EXCEEDS YOUR EXPENSES
T HARV EKER

General Insurance

Personal Line



Health Insurance



Super Top Up



Personal Accident



Car Insurance



Travel Insurance

Commercial Line



Factory Premise Insurance



Shop/Showroom Insurance



Fire Insurance



Workers Compensation



Employees Group Health Insurance



Marine Insurance

Prepare the umbrella
before it rains.



General Insurance

Comprehensive General Insurance Solutions

- ▶ Using a RISK MANAGEMENT PROCESS, we play the role of a genuine consultant to customers.
- ▶ Our expertise lies in proper assessment of the risk, competitive pricing, accurate policy wordings and secured hand-holding during claims.

Our USP

- ▶ We work with all the leading General Insurance Companies.
- ▶ Claims Support through a dedicated Claims Vertical.
- ▶ Convenience of at your door step servicing with pick-up and delivery facilities when required.
- ▶ Constant identification, up gradation and pitching of the best-selling products from all the Insurance Companies for our Customers.
- ▶ Innovation, integrity, and Practical Approach is our mantra for your complete protection and financial safety.

100 + corporates and 1500 cr + assets insured

Aim: 500+ corporates and 5000 cr + assets insured

Channel Partners



Life Insurance

What is Life Insurance?

Life Insurance is defined as a contract between the policy holder and the insurance company, where the life insurance company pays a specific sum to the insured individual's family upon his death. The life insurance sum is paid in exchange for a specific amount of premium. Life is beautiful, but also uncertain. Whatever you do, however smart and hard you work, you are never sure what life has in store for you.

It is therefore important that you do not leave anything to chance, especially 'life insurance'. As death is the only certain thing in life, apart from taxes, it pays to insure it well in advance.

Why you Need a Life Insurance Now?

The significance of having a life insurance is to avail the "peace of mind" that it brings along. However, having an adequate amount of life insurance effectively sets your mind free of some important questions like:

- ▶ What will happen to my family financially after I die?
- ▶ How will my wife and kids take care of their expenses after I am no more?
- ▶ How will I provide for my family in case I lose my job after an accident?
- ▶ How do I ensure that I am able to fund my child's higher education?
- ▶ How do I ensure an income after my retirement?



Equity PMS

Equity Portfolio Management Services

Equity is the highest returns yielding asset class of all. It gives you the best returns only if it is managed under professional guidance.

We, at Centric Wealth, have tied up with some of the best equity portfolio managers across India to provide our clients best investments experience. These fund managers are having experience of more than 10 years in equity portfolio management and they are highly reputed in this field.

The minimum investments required for equity portfolio management are,

- A) 5 Lakhs +
- B) 50 Lakhs + (PMS)
- C) 1 Cr + (AIF)

Please connect with us to know more about this.



Our Clients

- Adani Ltd
- Vishaka Industries
- Veeraj International LLP
- Money Grow Advisors
- Measure One Solutions Pvt Ltd
- Envisafe Consultants
- Turakhia Agencies
- IH Jewellers
- Shangar Décor Ltd
- Icestone Technologies
- PHP Dots Technologies
- VKJD Associates
- Rinkesh Shah & Associates
- Dhariwal Advisors
- Tara Paints and Chemicals
- Swati Fire Protection Pvt Ltd
- Chase Logistics
- Parshwa Petrochemicals Pvt Ltd
- Pramukh Modular Kitchen
- Translink Infra Consultants Pvt Ltd
- Citizen Solar Pvt Ltd
- Ainakwala Optical Store
- Aspen Vacations
- Rutvik Engineering Pvt Ltd
- Sneh Impex
- Amdavad Eye Laser Hospital Pvt Ltd
- Malani Impex
- Zinzuwadia Jewelers
- Coldwell Brokers - Gujarat
- Anaya Overseas
- Remax Metro - Ahmedabad
- Easy Property Consultants
- KDA Architects and interiors
- Vintana Stores
- Theokaphe
- Global Dental Clinic
- Hotel German Palace
- Prabhat Traders - Astral Pipe
- Radhe Krishna Gems & Jewellery
- Jadia Jewelers
- Mahadev Pulses Pvt Ltd
- Nahar Zinc
- Green Energy
- Meghal Shah & Associates
- Gallons Water
- Kaashi Logistics
- LA Décor Interiors
- AVJ Constructions
- PB Ceramic
- Manohar Bags
- Umiya Motors
- iConsult India
- Care Insurance Associates
- DVtech Engineers
- Pelican Air Conditioner
- The Nutrishaala
- Manek Ratna
- Vihar Fadia Architects



CENTRIC WEALTH[®]
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**IF YOU DON'T FIND A WAY TO
MAKE MONEY WHILE YOU SLEEP,
YOU WILL WORK UNTIL YOU DIE.**

WARREN BUFFET

CENTRIC WEALTH ADVISORS LLP

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