

## CreditBuzz Consulting Services

We believe in simplifying finance, creating wealth, and helping our clients achieve financial independence.





# OUR SERVICES

## Service 0

#### **Investment Solutions**

- · Mutual Funds & PMS
- Fixed Deposits
- · Life, Health, Motor & General Insurance
- Travel Insurance, Forex Card & Forex Cash

## Service

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## **Initiation Phase**

- · Home Loan
- Loan Against Property & Securities
- · Working Capital Finance
- · Business Loan & Personal Loan

## Service 02

#### **Banking Solutions**

- Savings & Current Accounts
- Business Banking & Treasury Management
- · Overdraft Facilities



**Our Strengths** 

- · 400+ clients across India
- •₹130 Cr in Mutual Fund portfolios
- ·₹70 Cr in Fixed Deposits
- · ₹15–18 Cr monthly loan disbursements (secured & unsecured)
- Dedicated team of 3 experienced Relationship Managers

## Advisory Services

- Wealth Management & Portfolio Advisory
- Retirement & Family Goal Planning
- Treasury & Liquidity Management for Corporates
- General Corpus Creation

### **Advisor Profile**

Our Principal Advisor brings 20+ years of experience in Wealth & Banking, including:

- 15 years at HDFC Bank, managing a branch with a business size of ₹1,000 Cr+
- Prior roles at RBS (Royal Bank of Scotland), HSBC, and ICICI Securities, managing HNI portfolios of ₹25 Cr+ each
- Strong expertise in wealth management, portfolio advisory, and financial planning for individuals and corporates