

Contact

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Top Skills

MIS
Marketing Strategy
Customer Service

Shilpi Kanstiya

Founder at Phoenix Wealth Creators | Financial Mentor | Insurance Professional
India

Summary

We are a professional niche firm comprising of MBA's & CA's. We are running the venture since last 9 yrs and have seen an exponential growth over the period. Starting with Insurance & Tax planning services, today we have diversified both horizontally and vertically across the complete Personal Finance and Risk Management spectrum.

Experience

Phoenix Wealth Creators

Founder

July 2011 - Present (9 years 2 months)

India

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As a part of our services, we can help you:

1. Save More through -

- a. Comprehensive Expense Analysis: We analyse your current expenses to identify opportunities to save more.
- b. Taxation Planning

2. Secure your Present by -

- c. Comprehensive Insurance Planning and Coverage
- d. Emergency Funds and Optimisation

3. Build Your Future by -

- e. Identifying and prioritising your Future Goals: Our goal is to ensure your financial goals are reached.

- f. Your Comprehensive risk profiling: Using our Risk Assessment methodology to identify your risk appetite.
- g. Investment Recommendations as Unique as You: Asset allocation that is tailored for your specific need.

4. Execute and Manage your Financial Plan:

- h. Prepare your Plan: Dedicated team to prepare your Personal Financial Plan.
- i. Manage your Plan: Starting from the word 'go', our platform and planners keep track of your portfolio's performance on a real time basis to aid you in proactively realigning it to your goals as and when required. This includes a periodic review and re-balance (where required)
- j. Implement Your Plan: A team dedicated entirely for Implementation assists you to execute your recommended Financial Plan.

HDFC Bank

Personal Banker

May 2011 - August 2011 (4 months)

Education

Asia Pacific Institute Of Management

PGDM, Finance & Marketing · (2009 - 2011)

Annamalai University

MCom, Accounting & Finance · (2009 - 2011)

The Bhawanipur Education Society College

Bachelor of Commerce - BCom, Accounting & Finance · (2006 - 2009)

Ashok Hall Girl's Higher Secondary School

12th, Commerce · (2004 - 2006)

Welland Gouldsmith School

10th, General · (1992 - 2004)