



COMPANY PROFILE

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01 ABOUT COMPANY

Real Wealth is all about protecting client's money with core offerings being **Insurance & Risk management**. We further help clients in journey of Wealth Creation through complete **Financial Planning & Investment consulting**



02 ABOUT FOUNDER



PRAKASH BHANUSHALI

Mr. Prakash Bhanushali, the founder, is a highly seasoned insurance professional with an impressive track record spanning over **30 years in the industry**. Throughout his extensive career, he has amassed a wealth of practical experience, becoming well-versed in the nuances of insurance and honing his expertise to benefit his clients.

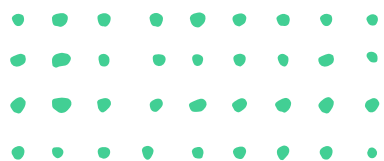
His educational background includes a **Post-Graduate Diploma in Health Insurance**, which exemplifies his specialized knowledge and deep understanding of the intricacies involved in the ever-evolving health insurance landscape. In addition, he holds a **Diploma in Insurance**, showcasing his comprehensive grasp of insurance principles and practices across various domains.

He is **Chairman Club Member** of Life India Corporation. Furthermore, he has accomplished prestigious **MDRT (USA)**. With his extensive experience and expertise, Mr. Bhanushali provides tailored insurance solutions and expert guidance to clients, ensuring their needs are met with precision and excellence.



Recognized for Outstanding work in Industry

Mr. Prakash Addressing Insurance fraternity



03 COMPANY BACKGROUND

1991

Founded "Samarth Insurance Services" a proprietary Insurance Agency

2020

Restructured and rebranded as "Real Wealth IMF LLP" with corporate insurance License

1997

Started offering Financial Planning and allied services

2022

Started In-house Mutual Fund and Equity Distribution

01 Vision

To be the leading financial services provider, committed to client satisfaction, innovation and excellence

02 Mission

To provide comprehensive insurance solutions and expert financial guidance, ensuring peace of mind and financial well-being for our clients

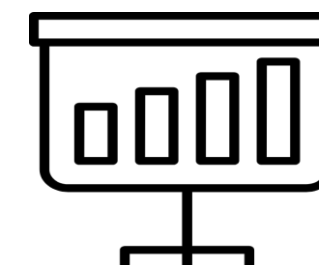
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Core Services



INSURANCE & RISK MANAGEMENT

We provide comprehensive insurance cover and peace of mind. We offer a wide range of tailored insurance products for individuals, families & businesses. We specialize in providing essential insurance products, including Life, Health & other General Life Insurance products. With personalized solutions and exceptional customer service, we aim to be a trusted partner in protecting our clients from unforeseen events.



Financial Planning & INVESTMENT

We specialize in financial planning services. We understand the importance of planning for retirement, and we work closely with clients to develop personalized retirement strategies, ensuring financial stability during their golden years. Additionally, we assist families in planning for major milestones such as children's education & marriage. By evaluating individual goals and financial circumstances, we create tailored plans that encompass savings, investments, & risk management, providing a solid foundation for a secure financial future. We empower individuals to achieve their long-term financial objectives

04 OTHER SERVICES



Mutual Funds



Equity & Debt
Instruments



Financial Goal setting
and prioritization

04 OTHER SERVICES



Business Continuity Plan



Keyman Insurance



**Employer-Employee
Welfare Economics**



Net-Worth Analysis



Risk Profiling



**Customized Asset
Allocation**

05 Operational Highlights

Near Perfect Client Renewal Rate

Exhibiting high Client Service & Client Satisfaction

High Client Satisfaction

With Coverage Explanation to Claim Settlement

30+

Years of Experience

1500+

Families Insured

15+

Partner Insurance
Companies

05 Advantageous Position

| | Individual Agent | Real Wealth (IMF) | Web-Aggregators |
|-----------------------------------|------------------|-------------------|-----------------|
| Claim Assistance | High | High | Low |
| Major Insurance Companies options | X | ✓ | ✓ |
| Expert knowledge | Low | High | High |
| Premium Bargaining Power | X | ✓ | ✓ |
| Client Service | High | High | Low |

06 Our Licenses

- We are **IRDAI** (Insurance Regulatory and Development Authority of India) Registered Insurance Firm
- We are registered with **AMFI** (Association of Mutual Funds in India) for advocacy & distribution of Mutual Funds

IRDA IMF License :

IMF087334700920220560

AMFI ARN :

ARN-257508

Corporate Identification Number

AAT - 4738

07

Partner Insurance Companies

General Insurance



Health Insurance



Health Insurance



THANK YOU



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LOCATION

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