

Where Integrity
Meets Investment



The one-stop solution
to your financial needs

Enrich Wise 
Give Wings To Your Dreams
Since 2005
AMFI Registered Mutual Fund Distributor
AMFI Registered SIF Distributor

Corporate Office : Bellona, 5th Floor, The Walk,
Hiranandani Estate, Thane (W) 400 607

2401-2404, 24th Floor, Kesar Solitaire, Palm Beach Road
Sector 19, Sanpada, Navi Mumbai 400705

Email: planner@enrichwise.com

Call: 8433722854 / 9082252227 / 9653387088

enrichwise.com

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ISO 9001:2015 CERTIFIED

Enrichwise: Give Wings
To Your Dreams

300
-YEARS-
VISION

At Enrichwise, we're passionate about **empowering** individuals and families to achieve their financial goals and helping them **Retire Rich**.
We go beyond traditional financial services, acting as your **trusted partner** on the journey to financial security and prosperity.

1 Lakh+

Returns Filed
Successfully

₹3,500+Cr

Assets Managed
Across Products

Mumbai's
Largest

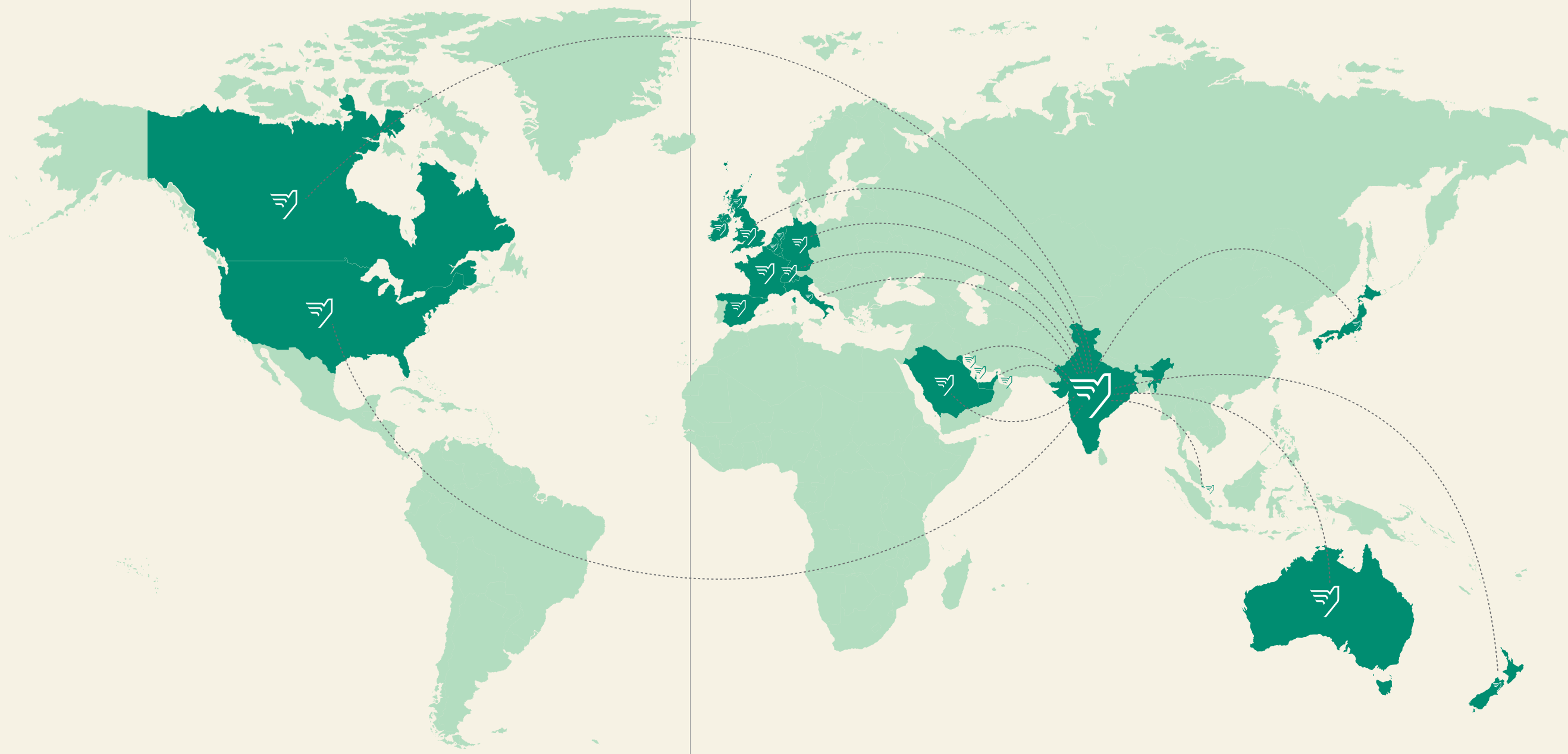
Multiservices
Financial Firm

20+
YEARS

20,000+
CLIENTS

20+
COUNTRIES

Spreading Wings
Across The Globe



Our Journey To The Top

Founded on the principles of integrity and excellence, Enrichwise emerged from the boutique accounting firm of **CA R. K. Jain** in 2005.



2006
Stocks & Demat Services

Launched stock broking & demat services during the **global financial crisis**.

2012
Enrichwise Pvt. Ltd. is Formed

Corporate identity established with a clear **Mission & Vision**.



2019
Corporate FDs & Bonds

Expanded into corporate **fixed deposits and bonds**.

2022
Enrichwise Insurance Broking is Formed

Launched KAVACH
Protect What Matters. Integrated insurance into holistic financial planning.



2024
Venture Into PMS & AIF

Entered the **portfolio management** and alternative investment space.

2026
A New Chapter in Growth

Expanding our footprint with the inauguration of a world-class corporate branch at **Palm Beach Road, Navi Mumbai**.



2005
Enrichwise Comes Into Being

Enrichwise is founded. Started with TAX filing services & accounting. Born from **CA R. K. Jain's** boutique practice, built on integrity and excellence.

2009
Spreading Wings Across the Globe

Trusted by NRIs for seamless investment & tax solutions
Enrichwise goes global.

2014
Mutual Funds

Became an AMFI-registered Mutual Fund Distributor.

Launched RAFTAAR
Accelerate Your Early Retirement.



2021
Legal, Wills & Succession

Started services for Will drafting, Succession & **HUF formation**.



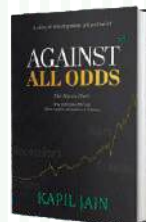
2023
A New Era Begins

Inauguration of our world class corporate head office at **The Walk, Hiranandani Estate, Thane**.

2025
Introduced SIF, Global Investments & Loans

Enabled SIF, global investments through GIFT City. Introduced loans as a new service vertical.

Book Launch – Against All Odds



KEY MILESTONES



OUR Vision

To be the recognized leader and most trusted business partner in the financial services industry.

OUR Mission

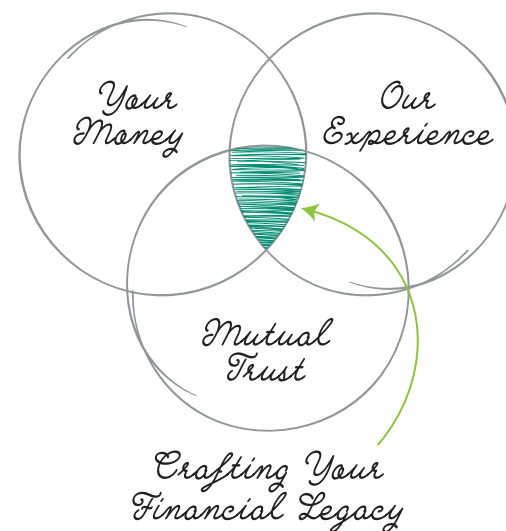
Providing financial and insurance solutions through a winning combination of experienced professionals, world-class service and latest technology.



OUR Values

Integrity, Ethics, Trust, Commitment, Accountability, Excellence, Teamwork

THE Enrichwise Philosophy



Investing With A Vision

OUR GUIDING PHILOSOPHY

Our investment philosophy at Enrichwise centers on safety, stability, and thoughtful long-term growth. We focus on building resilient portfolios with investments in top-rated, AAA Blue-Chip companies.

We do not engage in day trading or futures and options, preferring a conservative approach that prioritizes capital preservation while allowing for steady growth.

OUR VALUE PROPOSITION

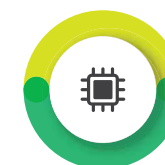
What we bring to the table:



Experienced and Qualified Professionals



Diagnostic Tools and Technology for Portfolio Management



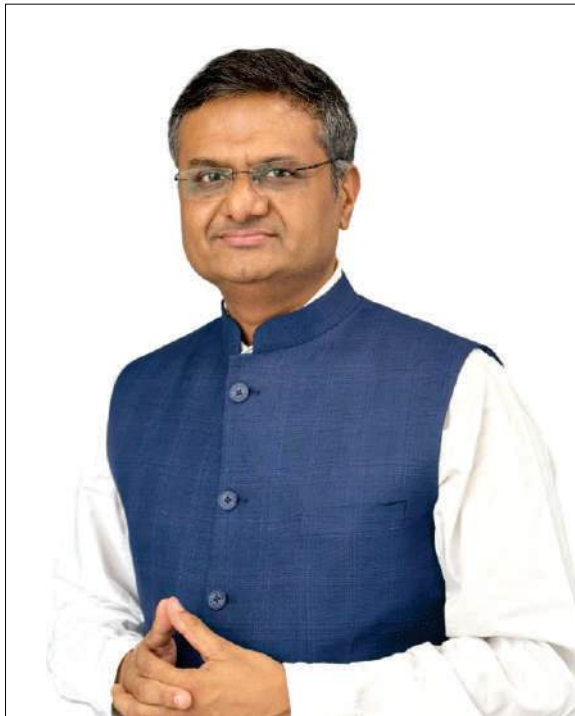
Proactive Monitoring of Your Investments



Rapid Responsiveness

Our approach combines sophisticated financial strategies with personalized service to create a one-stop solution for achieving financial security.

At The Helm



Kapil
Jain
Director

Kapil brings over two decades of expertise in the stock market, blending analytical prowess with a deep understanding of finance. An NIT alumnus with a degree in Computer Science Engineering and an MBA-Finance Gold Medallist from IIM-Indore, he seamlessly integrates technology and financial acumen.

He excels in financial analysis, wealth management, financial planning, asset management, project finance, and portfolio management. His specialization in financial planning, investment advisory, and taxation underscores Enrichwise's commitment to excellence and innovation under his leadership.



Shobhana
Jain
Director

Shobhana Jain plays a pivotal role in Enrichwise's success, overseeing administration and operations with a keen eye for detail. Holding a Bachelor's in Science and a Master's in English Literature, her diverse background enhances her organizational insight.

With over 15 years of blogging experience, Shobhana's passion for writing and knowledge-sharing enriches Enrichwise. Her influence extends beyond her title, inspiring the team with her vision, expertise, and unwavering commitment to excellence.

The DNA of Leadership...



Rishika
Jain

CA

A qualified Chartered Accountant who has cleared CFA Level III, she became a full-time member of Enrichwise in 2022.

Specializing in direct tax, capital markets, equity research, and mutual funds, Rishika offers comprehensive insights into these critical areas. Her analytical skills and deep knowledge of tax regulations and financial instruments make her a valuable asset to the Enrichwise team.

The A Team



Ajitkumar
Devdas

As Enrichwise's authority on stock market investments, he is both an expert in his field and a mentor to those seeking to navigate the complex world of equities.



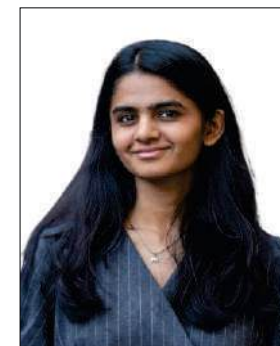
Bhavik
Jain

He specializes in business strategy and financial analysis, bringing a fresh perspective and keen analytical skills to the company.



Reshma
Bhansali

Reshma, a Mumbai University MBA in Human Resources, brings over 25 years of industry expertise in 5 Fortune 500 companies.



Suhani
Jain

Suhani is a CA Finalist with a deep understanding of financial analysis and strategic planning.



Swati Vishwasrao

10 Years Experience.
Tax Expert



Karteeki Panse

8 Years Experience.
Mutual Funds,
Portfolio Management



Shivakanchi Kokane

7 Years Experience.
Client Co-ordinator,
Solutions Expert



Jayashri Bhole

8 Years Experience.
Process Co-ordinator,
Monitor Manager,
Mutual Funds, Stocks



Rinku Gala

8 Years Experience.
Mutual Funds,
Stocks, Insurance



Urvi Rangani

5 Years Experience.
Mutual Funds,
Stocks



Plato Lobo

Head of Sales
Overall 17 Years
Of Experience



Prachi Lavatre (CA)

Tax & Business
Process Automations
CFA Level III Cleared
6 Years Experience

Laurels Of Success

Our Honors And Awards



Voyage, 2024
Aditya Birla Sun Life Mutual Fund



Achiever of Har Ghar
SIP Movment, FY - 2023
Aditya Birla Sun Life Mutual Fund



Multi Asset Allocation
Fund, NFO - 2023
Aditya Birla Sun Life Mutual Fund



Privilege Club,
Annual Qualification, FY 22-23
Diamond Club,
Aditya Birla Sun Life Mutual Fund



Star Award 2023
SBI Mutual Fund



Privilege Club,
Annual Qualifier, FY 21-22
Platinum Club
Aditya Birla Sun Life Mutual Fund



10000 CR ICICI
Prudential Flexicap Fund
ICICI Prudential Mutual Fund



Shining Star
Aditya Birla Sun Life Mutual Fund



Elite Black, 2017-18
Upper Crust Club

Our Value Proposition

Complete 360 degree Financial Service Provider...



Financial Solution

- Retirement Savings
- Children’s Education Solutions
- Portfolio Restructuring

Tax Filing & Return Filing

- Tax Filing
- GST Filing
- NRI Filing

Investment

- Mutual Funds & SIF
- Tax Free Bonds
- NCDs & EMPs
- Stocks & Demat
- PMS & AIF
- Gift City
- Global Stocks

Financial Protection

- PAN Services
- Wills & Legal
- Loans
- Insurance
- Treasury Management

INTRODUCING



Corporate Employee Solution

- GROUP MEDICLAIM
- GROUP PERSONAL ACCIDENT
- GROUP TERM LIFE
- KEYMAN INSURANCE

Life Insurance Solution

- TERM LIFE
- ULIP PLANS
- ENDOWMENT PLANS
- PENSION PLANS
- LIFE INVESTMENT PLAN

Retail Insurance Solution

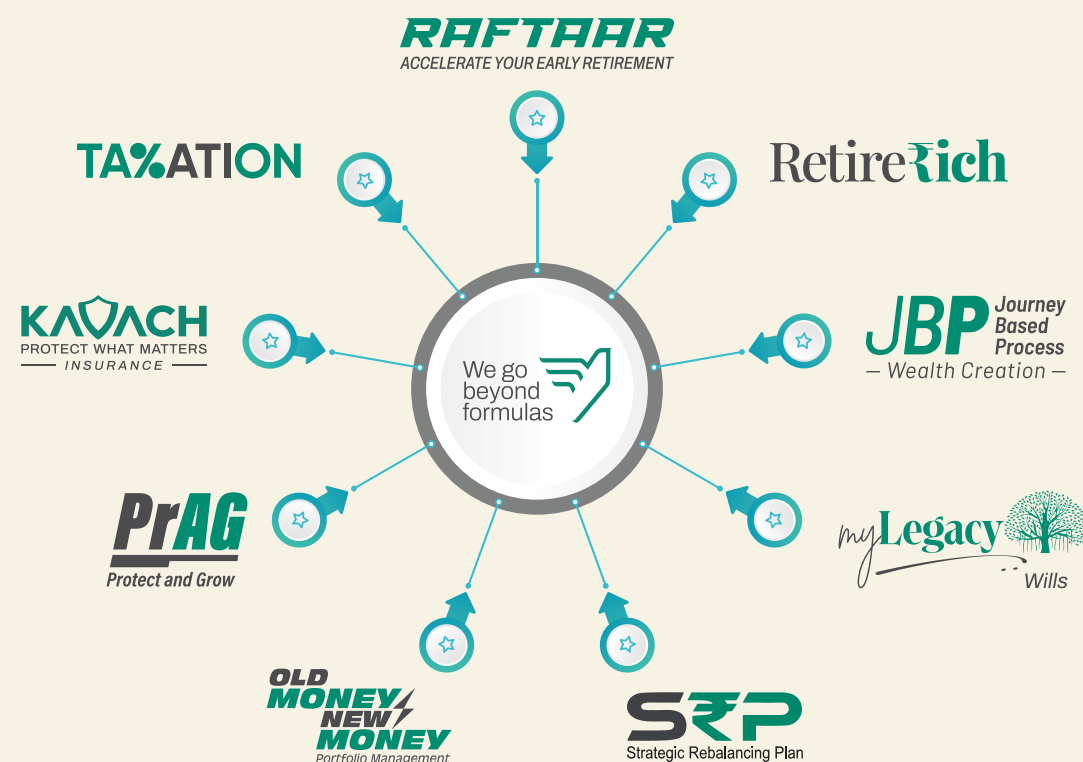
- TWO WHEELER
- PRIVATE CAR
- HEALTH
- TRAVEL
- COMMERCIAL VEHICLE
- COMMERCIAL LINES
- PERSONAL ACCIDENT
- CRITICAL ILLNESS
- HOME



INSURANCE

Our Unique Processes

The Fabric Of Our Financial Expertise



RAFTAAR ACCELERATE YOUR EARLY RETIREMENT

RAFTAAR unlocks your wealth potential through a combination of strategic step-up SIPs and dynamic asset allocation.

PrAG Protect and Grow

Our PrAG process safeguards your wealth for the future. This proactive approach balances protecting your progress with capitalizing on market opportunities.

JBP Journey Based Process – Wealth Creation –

We work together with you to craft a personalized plan within a 1-year, 3-year, or 5+ year timeframe to achieve your short-term and long-term financial goals.

OLD MONEY NEW MONEY Portfolio Management

This two-pronged approach helps you safeguard your existing investments while growing your new investments.

6Point ★★★★★ **Enrichment** Retirement Solutions

Unlock your financial potential with ENRICH, our comprehensive 6-step plan for achieving long-term prosperity.

ENROLL in a Pure term insurance plan (8-10 times your Net Annual Income) and **Reject Inferior Traditional Insurance Policies.**

NOURISH your wealth: **Allocate 20-35% of your income to Mutual Funds/Stocks** or watch the Inflation Monster devour your corpus!

REFRAIN from engaging in Stock Market Trading and Speculation.

INITIATE a **Core Corpus** equivalent to 4 times your annual income, blending Debt MF, Equity MF and Blue chip stocks in your portfolio.

CRAFT a stable financial base by **Cropping Home Loan EMIs at 30%** of your income.

HANDLE your assets wisely: **Regularly review & adjust based** on your needs and market condition.

PROCESSES



YOUR FINANCIAL JOURNEY
BEGINS HERE...





GREAT COMPANY
GREAT PEOPLE
GREAT WORK PLACE





PLANTING THE SEEDS OF FINANCIAL WISDOM....



Connect With Us

 @enrichwise.financial.services

 @enrichwise_financial_services

 Enrichwise Financial Services pvt.ltd

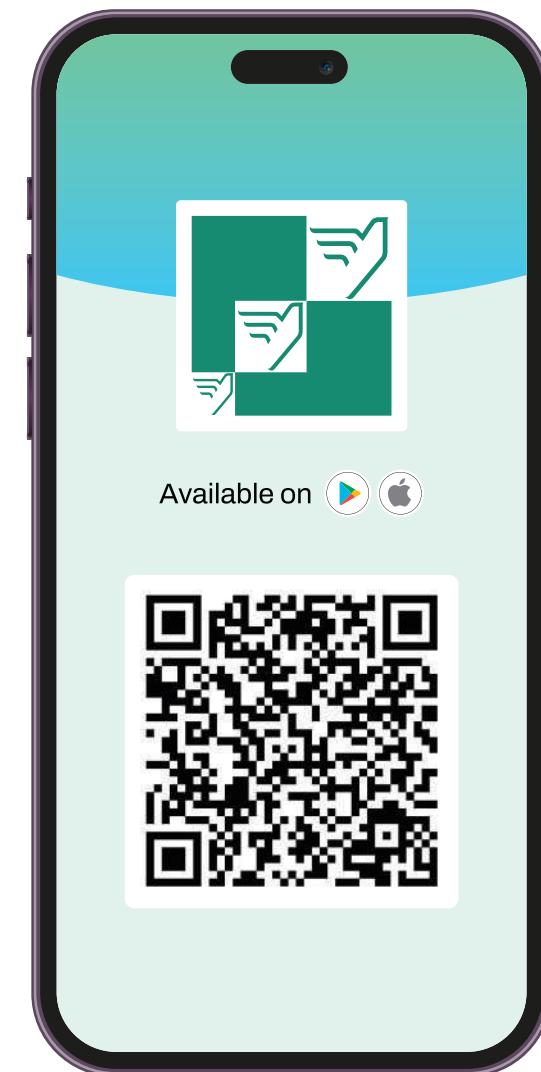
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Book an Appointment

Just One Tap Away



Portfolio Review

Regular market updates

Updates on latest NFO

Notifications of SIP schemes

Access to financial calculators

Updated NAV

Download Our App Now

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Sector 19, Sanpada, Navi Mumbai 400705

Corp. Office: 5 Floor, Bellona, The Walk,
Hiranandani Estate, Thane (W) 400607

Regd. Office: 21/22, VEGA, 3rd Floor,
Hiranandani Estate, Thane (W) 400607

CONNECT