

# WE HELP YOU TO ACHIEVE FINANCIAL INDEPENDENCE



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## Laxmi Insurance & Investment



opp St' Mary High School, Gandhi Nagar, Jogeshwari (East), Mumbai - 400 060.

# Profile

- We are the, founder of LAXMI INSURANCE & INVESTMENT.
- I have been enjoying ths financial planning profession since last 15 years LAXMI INSURANCE & INVESTMENT.
- I am member of MDRT- USA , which is the highest Recognition in financial industry in the world.
- Team Of Dedicated Members To Give Services and Justify The Business .

## Mission



Having built excellent trust & Relationship with my clients and providing range of services, we consider it our mission to share our valuable insurance & investment knowledge with you.

Whatever your circumstances, we'll use our experties and excellent relationships, to ensure you to meet your financial goals

## Achievements

- Serving more than 500 clients as INS Advisor for Life Insurance Corporation of India
- Successfully done the financial planning and insurance portfolio management of these families over a period of last 15years.
- My Experience and knowledge on LIC's products help me plan better.
- We believe in long term relationships with clients and most of our clients are engaged with us for long term.
- Recognized as a MDRT (USA) consultant which is the 3rd Highest Rank in the World for Insurance Professional.
- Always on the first position in the agency organisation of my Development Officer's team.

# Service



Retirement Solution



Wealth Creation Planning



Virtual Property Creation



Legacy Planning



Education plans for your children

Our Team can offer personal insurance services ranging from Life Insurance to Health Insurance. We also have a team specializing in retirement planning and child education planning. We promise to provide impartial advice with no jargon, and ensure you understand all the details of your cover. Listed are some of our services



Family Financial Protection Planning



Creation of Tax-free Asset with Regular Income

## Associate with



## Asset Allocation

### Safe Portfolio

### Medium Risk Portfolio

### Risk Portfolio

### Asset Allocation Parameters

**Safe Portfolio:** 5-6% guarantee Returns Tax Free Returns  
100% Capital Protection

**Medium Risk Portfolio:** 10-12 % Returns Tax Free or  
Taxable Returns Partly Capital Protection

**Risk Portfolio:** 15-18% Returns Taxable Returns No Capital Protection

## Financial Planning Thumbrule



**30%**  
Expenses



**10%**  
Life Style



**30%**  
Saving Divided  
into 2



**30%**  
EMI



**30%**  
Compulsory  
Saving

**15% Short Term**  
**15% Long Term**

### Short Term Goals

Children basic immediate educational Goals  
Fulfilling dream of taking a Car, house & Foreign Vacation  
Upgrading Car, house & Foreign Vacation



### Long Term Goals

Retirement at Age 60  
Children's marriage  
Children Higher educational goals





## Testimonials



**Hetal Shah**  
(I.T Engineer)

Dhiren Savla and Nehal savla are very friendly and helpful in nature. professionally they are very committed. They have multiple combinations of advice & give variety of option to choose



**Viral & Jigna**  
(Entrepreneur)

Nehal & Dhiren Savla explain our intricate financial needs in simple language which makes it so easy to understand concept & helps in better decision making



**Dr. Sonali Shetty**  
(Prosthodontist)

Nehal Savla and Dhiren savla are professional Advisors and recommended me good plans I have some of the best plans available from LIC I would recommed Dhiren savla and Nehal savla for any insurance related policies



**Vinit Gada**  
(C.A)

I highly recommend Dhiren savla and Nehal savla for their Understanding of Life Insurance Product. They have the ability to connect with clients, understand their Long term goals and suggest best Suitable Option.



## Gallery



Our mission is to help atleast 50,000 females to attain financial freedom



## DHIREN & NEHAL SAVLA

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