

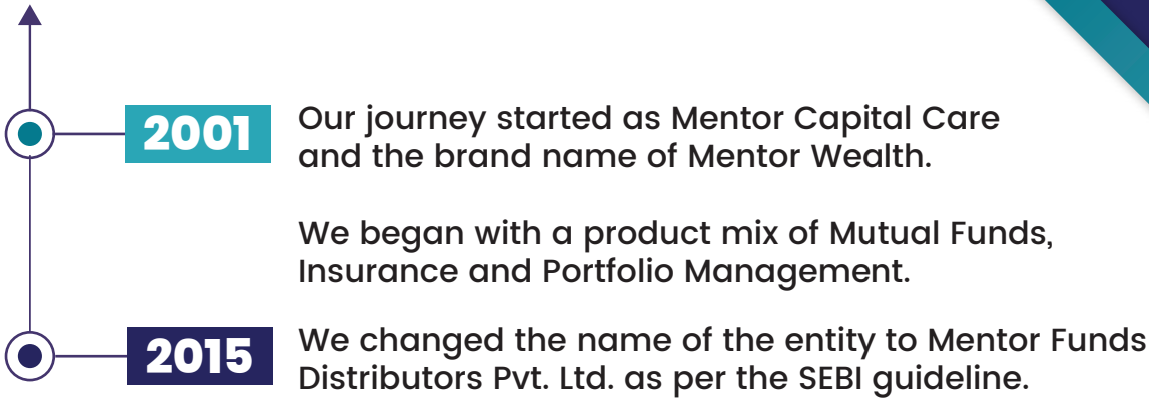


*Mentor Wealth*<sup>®</sup>



**MENTOR FUNDS DISTRIBUTORS PVT. LTD.  
COMPANY PROFILE**

# OUR MILESTONE



# OUR PHILOSOPHY



## MISSION

Our mission is helping investors secure their financial future with Trust, Integrity and Secured Services.

To empower our investors and enable them to achieve their financial goals through a transparent and customer centric system, supported by technology.

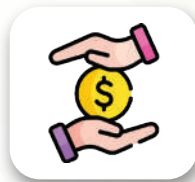
## VISION



## VALUES

Trust, Integrity, Secured Services

# INVESTMENT AVENUES



Mutual Funds



Fixed Income

## TARGET MARKET

*Individuals with Disposable Income for Smart Investments*

In this updated era, we're focusing on individuals who not only have spare income but are also interested in making smart investment choices. This narrows down our target market to people who are likely to be more receptive to our investment products or services and aligns our marketing efforts more closely with their needs and interests.

## MARKET PRESENCE

*Nationwide Coverage Across India (PAN India)*

This succinctly conveys that our company's operations extend throughout the entire country, providing a clear picture of your extensive geographical reach. It's a valuable asset for businesses to have a PAN India presence as it opens up opportunities to serve a diverse range of customers and markets.

# AWARDS & ACCOLADES

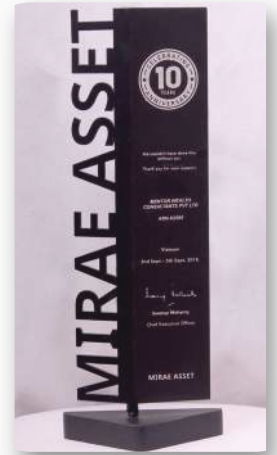


**22** Years journey fulfilling our customer's financial goals

**70%** Our clients are from the Non-HNI category\*

**70%** Our clients are associated with us for more than 12 years

# AWARDS & ACCOLADES



**1200** Happy Customers

**30%** Our clients are from the HNI category\*

\*Non HNI - investable income of Rs. 10,000- 30,000 per month | HNI - investable income of Rs. 50,000 or more per month

# OUR LEADERS



**OM PRAKASH** | *MD and CEO. Founder*

(An MBA from Lal Bahadur Shastri Institute of Management, 22 years of experience. Core strengths- Finance Market behaviour, mapping the right product mix in light of the financial goals, customer-centric attitude)



**SANGITA SHARMA**

*Operations & HR Head*

Has been managing the recruitment and supporting with day to day operations for smooth functioning of the organization



**VINAY K SINGH** | *Strategy Advisor*

A technocrat turned Entrepreneur & Business Development Mentor with over 15 years of experience in providing coaching & mentoring for setting up Global Business that runs with minimum efforts



**RITU CHOPRA** | *Vice President (Customer Success)*

Graduate, with 26 years of experience in varied industries. Core Strength- Handling complex operations, Customer Relationship Management, strong communicator.



**MAHESH PANDEY** | *Vice President (Sales)*

Taking care of all sales related activities



**NEHA ARYA** | *Operational Manager*

Taking care of all backend processes & Transactions

# OUR LEADERS



**ANURADHA ASHIT | Sales Team**

(A BCOM, with PG Diploma in Banking Finance and Wealth management, Certification in NISM Series V-A in Mutual Funds. She is part of the Sales Team, taking care of Individual and Institutional sales.)



**AASTHA CHAUBEY | Research Team, Research Analyst**

(Bcom graduate from BHU, Post Graduation Diploma in Banking Finance & Wealth management, Certification in NISM Series V-A in Mutual Funds, NISM Series VIII Equity Derivatives & NISM Series XXI -A PMS Distributor. She is part of Research team, a Research Analyst.)



**SHUBHAM PANDEY | Sales Team**

(A BCOM Graduate, with PG Diploma in Banking Finance and Wealth management, Certification in NISM Series V-A in Mutual Funds. He is part of the Sales Team, taking care of Individual and Institutional sales.)



**KIRAN GUPTA | HR, Admin & Operations**

(Mrs Kiran Gupta, MBA in HR, having a substantial experience in HR, Admin & Operations for more than 8 years and she is supporting the Company in her areas of her expertise.)



**POONAM MEHRA | Operations Team**

(A Bcom Graduate, Is currently part of the Operations Team.)

# CLIENT'S TESTIMONIAL

“

Wealth Management business is all about Trust and customer Centricity and Mentor wealth is exactly doing this ...Kudos to you and your team

AMIT MALHOTRA

”

“

The best part about Mentor Funds is the honesty and sincerity with which they manage their client's portfolio

PRIYA IYER

”

“

Very good and prompt service level have even seen. Very good staff and as well the mentor of this company OMPRAKASH JI. Well done keep it up.

SUNDEEP CHATRATH

”

“

Amongst the best financial advisors , gives the honest opinion and helps you achieve short -mid -long term goals with his simplistic yet in depth & insightful approach.

GARIMA RELHAN

”

“

I was impressed with the knowledge of Sh Om Prakash on financial fundamentals. Never looked back since associating with them since last 10 years.

ANKUR YADAV

”

“

It's grateful being associated with Mr. Om Prakash since last 4 years. A professional guy with a pinch of personal touch having a vast knowledge of the markets.

GAGAN ARORA

”

“

One thing that makes Mentor stand apart is the honest & sincere approach of Mr Om towards his investors, which is not very easy to find and will surely make his organisation grow along with the investors.

ANURAG TOMAR

”

“

Good platform to meet your advisory on Investments. Strong performance along with Good Customer Support even at backend

GAURAV GOSWAMI

”

“

I had started my Mutual fund journey with Mentor. I am in connect with them from last 4 year. I appreciate there help, support and guidance on timely basis.

**Best wishes to Mentor**

GAJENDRA SINGH

”



# *Mentor Wealth*<sup>®</sup>

Building a wealthy tomorrow



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