

We are pleased to introduce as a **Certified Financial Planner**<sup>CM</sup> providing holistic Financial Planning, Investment Planning, Retirement Planning & Risk management We provide a customized financial solutions to adequately secure the future of our clients. We offer goal based customized solutions based on risk profile of our clients.

### **Pankaj Kumar Gera, CFP ,<sup>CM</sup>**

- Has been Certified Financial Planner CM from Financial Planning Standard Board, India. He has done LUTC (US), PG Dip In Rural Management from IRMA, B Pharm.
- Has varied experience of working in corporate sector at various levels.
- Entered the business in 2003.
- Presently we service over 1000 clients across globe and manage in excess of Rs 15 Crores AUM in Mutual Funds and Insurance.
- Platinum Club Advisor with ICICI Prudential Life Insurance Company. Has qualified Million Dollar Round Table Conference Thrice in last 6 years.

### **ANJU GERA, MA (Economics), B.Ed.**

- Has been Agent Advisor with Max New York Life Insurance Company
- Has been providing Back Office Support to all the customer

**Gera Wealth Creators** is a team of Fee based financial planner who share a simple, professional philosophy:

**TRUST** | At gerawealthcreators.com, we're dedicated to shaping our customer's financial future – with the utmost integrity, professionalism, and discretion. Whether you're saving for your child's college or wedding or retirement – our solutions will provide confidence and peace of mind. Trust is the base of all our client relationships.

**COMPETENCE** | Our combined years of technical expertise, investment experience, and continuous ongoing learning, we provide realistic implement able financial solutions for all areas, such as investment, tax, estate (wills), retirement and insurance planning.

**OBJECTIVITY** | Every client's needs are unique – and that's why we listen very, very carefully to you. We will tailor our recommendation to suit your particular situation. And to avoid conflicts of interest in product sales, we will openly share brokerage or commissions or other compensation from client transactions based on our recommendations.

[Gerawealthcreators.com](#) was founded by **Pankaj Kumar Gera CFP**<sup>CM</sup> to offer personalized, fee-based Financial Planning to clients based in Delhi & Mumbai.