



InvestAgile Corporate Presentation

Our websites

www.investagiles.com

mutualfunds.investagile.in





About the Founder & CEO

Our Founder, **Paavan Virdee** comes with 18 years + experience in Banking, Financial Services & Insurance Industry. Her most recent assignment being with HDFC Bank Ltd. Driven by passion and a zeal to excel, she founded InvestAgile Consulting, based on a strong foundation of the knowledge & experience she gained from all the esteemed organizations and teams she has worked with.

“The dream behind InvestAgile is simple yet big - To simplify the understanding of financial products and to equip/empower financial decision making with the right knowledge. This promotes an informed decision making. Our vision is to be a reliable partner in Financial decision making, a one- stop solution provider. We endeavor to work towards sustainability and creating a happy community.

Our core values are driven by Integrity.”

A handwritten signature in black ink that reads "Paavan Virdee". The signature is fluid and cursive.

M.B.A Finance | UGC-NET Certified (Management)

Associate, IIBF (Indian Institute of Banking & Finance) | Associate, III (Insurance Institute of India)

IRDA Certified (Insurance Regulatory Development Authority) | AMFI Certified (Association of Mutual Funds of India)

About InvestAgile

InvestAgile, founded in 2019, is driven by a passionate team that stands firmly for its core values of Trust, Integrity, and Passion. Our organization is dedicated to providing best in class financial solutions tailored to each client's unique needs, supported by rigorous research. As a one-stop solution, we partner with the industry's best, ensuring due diligence, compliance with regulatory requirements, and a streamlined process. Our mission is to empower informed decision-making, and our vision is to be a trusted partner in all financial decision making.



Professional Team



Complete Transparency



Client First Approach



Need Based Solution

What we believe in

We believe in building a strong foundation & long lasting relationship based upon trust, transparency & client first approach.

50+

Corporate Clientele

75+

HNI & Ultra HNI Clientele

120+

Tax Advisory Clientele

And counting...



Creative thinking inspires ideas. Ideas inspire change! Let's connect

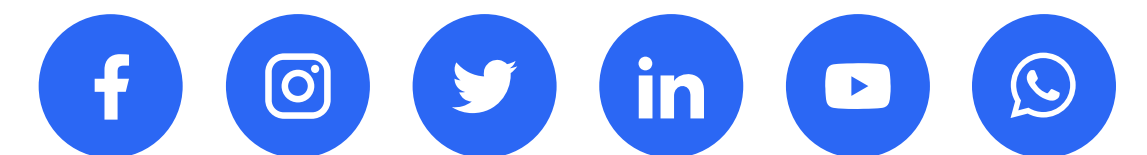
Our websites

www.investagiles.com
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