



THE MONEY MASTERS

Corporate Finance | Estate Planning | Wealth Management

INTRODUCTION DECK

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About CREDALIS Capital

Empowering clients to fulfill their Financial goals and aspirations

As a premier wealth management company, we take pride in providing personalized and innovative solutions tailored to each client's unique needs. With a team of experienced financial experts, we strive to be a trusted partner in your journey to financial success.



Our **Mission** and **Vision**



Mission

To create enduring value for our clients by offering comprehensive wealth management and investment services.



Vision

Empowering dreams and securing legacies through personalized and innovative wealth management solutions.

Market Gaps

Identified Market Gaps in Indian market



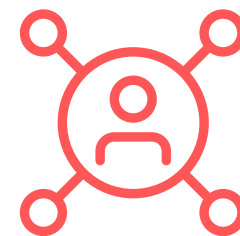
Service & Communication Issues

Poor service and communication contribute to client dissatisfaction, highlighting the need for improved quality and effective interaction.



Untapped Market

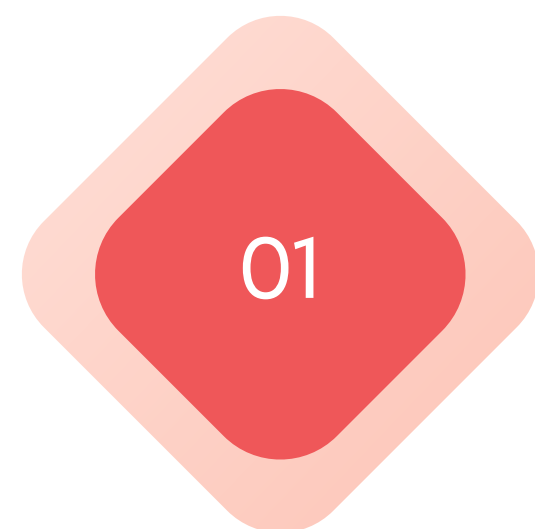
Despite growth potential, a gap remains for high-quality wealth management providers to enhance accessibility and solutions.



Changing Demographics

Adapting to shifting demographics and personalized service preferences poses a challenge for firms in India

Our Verticals



Corporate Finance



Estate Planning



Wealth Management

Corporate Finance

The focus revolves around evaluating the company's valuation, securing funds, strategically allocating resources for projects or investments, and ensuring prudent utilization to drive sustainable growth and profitability.

- IPO Listing
- PE Deals
- StartUp Fundings
- Strategic Investments



Estate Planning

The emphasis is on planning future that what happens to your money and things after you pass away. The goal is to make sure everything gets passed on smoothly to the right people & without causing problems.

- Legacy Planning
- Will Creation & Execution
- Power of Attorney
- Trust Formation & Management



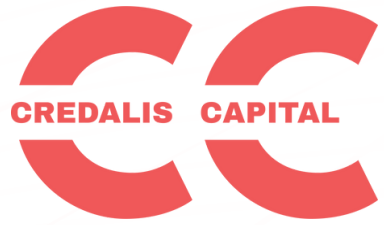
Wealth Management

The service aims to help clients effectively manage, grow, and protect their wealth while achieving their financial goals and securing their financial future

- Mutual Funds
- Alternative investment funds
- Bonds
- Arts and Collectibles
- Permanent Residence
- International Investment



Our Collaborations



Merchant Bankers



Estate Planners



Wealth Managers

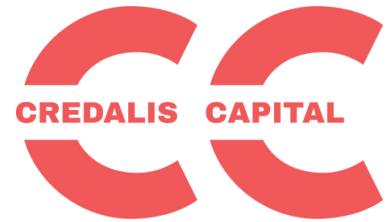


StartUp Investmetns





Icon Adcorp Pvt Ltd



Icon Adcorp Private Limited is one of the leading financial consultancy organization of Central India. Icon has been consistently serving Power Plants, Real Estate, Gems and Jewellery, Steel, Textiles, Banks, Automotive, Chemicals, Education and Non Profit Organizations, Energy, Utilities and Mining, Financial Services, Health Care industries of Chhattisgarh for the past 20 years.

Icon has a team of more than 30 professional CAs, CSs and CMAs. Icon has been guiding and mentoring many SMEs and Small Businesses grow exponentially and get financial stability.

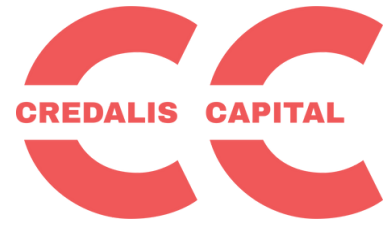
The company provides consultancy in **Debt-Syndication, Transaction Advisory, Rating Consultancy**. Today, we have carved a niche as one of the reliable Corporate Financial Consultants based in Central India

20 Yrs+

Corporate Experience

20,000 Cr+

Debt Syndication



B-Plan Advisors Pvt Ltd

BPlan Advisors is a boutique advisory firm, works From Concept to Creation, we are your dream team to build that dream VENTURE.

The team brings combined knowledge of 50+ years of professional experience, from various domains in National as well as international markets.



The Leaders are Alumni of prestigious institutes. They bring industry experience from leading corporates.



We help funded startups and family-owned businesses stand out by providing end-to-end services. When you work with us, we take full responsibility for services that helps you follow your passion.

Major Services Include: Venture Building, Branding & Marketing, Fundraising

05 Yrs+

Corporate Experience

25+

Subject Experts

Management **Team**



CA NILESH JAIN

23 Years industry experience,
Project Finance & Other
Financial Consultancy products



CA GOPAL BORDIA

38 years industry experience,
Banking, Finance, Carbon
Advisory Consultancy &
Management of Steel Industry.



ABHINAV KHANDELWAL

15 Years industry experience, Venture
Builder, 2 Ex-Founder, Entrepreneur
Mindset, Operator, Investor, Team Builder



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