Accurate® Wealth



YOUR WEALTH
YOUR GOALS
OUR EXPERTISE

Experience the Power of Smart Investing

₹65+ Crore Assets Managed

25+ Years of Combined Expertise

750+ Happy Clients

Clients Presence in 10+ Countries & 14+ States

Serving Clients 125+ Cities & 200+ Pin Codes

Awards & Photos



ABOUT US

Accurate Wealth is a leading financial architect for families, NRIs & business owners, serving 750+ trusted clients across India and 10+ countries for over 10 years. We put your financial goals at the center of everything we do.

Events (IAPs)













Accurate® Wealth

4 SERVICE PILLARS

RETAIL SERVICES

- Mutual Funds
- SIF · SIP · SWP
- Term Life Insurance
- General Insurance
- Fixed Income Products
- Tax Planning
- Retirement Planning
- Child Education Planning

NRI SERVICES

- NRE/NRO Investments
- GIFT City Products
- SIFs
- Repatriation Advisory
- Global Portfolio Management
- Tax Optimization for NRIs

CORPORATE SERVICES

- Treasury Services
- Bond Investment Guidance
- Corporate Fixed Deposits
- Group Health Insurance
- Group NPS
- AIF
- PMS
- Demat Account Services

HNI / UHNI / Family Offices

- Estate Planning
- Will Planning
- Succession Planning
- PMS
- Unlisted & Startup AIFs
- Global Wealth Access

DIGITAL ACCESS & SUPPORT

24/7 Online Portfolio Access · Real-time Reports · SIP & SWP Tracker
Insurance Summary · Goal Progress Monitor · WhatsApp Support Integration

MEET OUR TEAM

Dr. Yash Bhatt
Founder & CEO

Phd & MBA in Financial Services

Former CFP FPSB Centre Incharge

13+ Years of Financial Market Experience

Guided 4000 + Investors

50 + Investment Awareness Sessions

Keval Shah
Jr. Wealth Manager

Specialist in Retail & Portfolio Management

Expert in Goal Planning strategies and Investment Risk Management

Namrata Shah
Sr. Operation Executive
Insurance

5 + Years of experience

Expert in Life, Health, Vehicle & Corporate Insurance

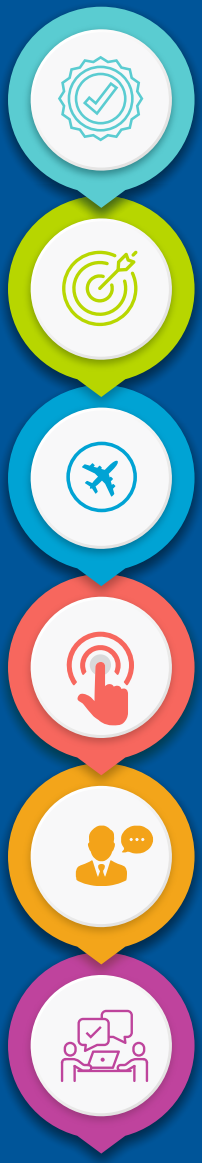
Guided 500+ Investors

Pragna Parmar
Sr. Operation Executive
Mutual Fund

3 + Years of experience

Expert in Mutual Fund operations and compliance

WHY CHOOSE ACCURATE WEALTH?



AMFI-Registered Mutual Fund & SIF Distributor

Fully regulated and compliant with AMFI norms — ensuring your investments are safe, transparent, and in trusted hands.

Goal-Based Planning

Every strategy is aligned with your personal life goals — not generic, one-size-fits-all products.

NRI Expertise

Specialized services for NRIs — FEMA-compliant, globally aligned, and tailored for cross-border financial needs.

Digital Dashboard Access

24/7 access to your portfolio, reports, and financial goals through our secure client portal.

Dedicated Relationship Manager

Enjoy personalized service with a dedicated expert — not a call center experience.

Business & Corporate Solutions

Comprehensive corporate services including treasury management, group insurance, and employee benefit programs — all under one roof.

CUSTOMER REVIEWS / TESTIMONIALS



I was searching for the best NRI investment services and Accurate Wealth truly exceeded my expectations. Their expert team provided seamless guidance on mutual funds and NRI taxation. I highly recommend accurate wealth for reliable and professional financial solutions.

Umang Patel, Business Owner, USA ★★★★★



Accurate wealth Team provide suitable solutions towards our Financial Goals and give Excellent after sales services which are most needed in the dynamic market conditions. All the best to Team Accurate Wealth

Motilal Bhagat, CMO - LIC of India ★★★★★



Here I got great advice for my investments, multiple options suggested and picked best from them. Amazing experience, totally worth if you are looking to get either short term or Long term investments.

Vijayant Jain, SAP Sales Consultant, TCS ★★★★★



Even after shifting to South Africa, Accurate Wealth has been my go-to for all financial and insurance advice. Their investment guidance is spot on, and the operations team is always helpful and responsive. One of the best mutual fund advisors in India for goal-based planning and portfolio management. Highly recommended!

Ishan Pandya, Accounts Specialist, South Africa ★★★★★

READY TO BEGIN YOUR FINANCIAL JOURNEY?

3 STEPS TO GET STARTED

STEP 1

Book a Free Consultation



Call, WhatsApp or scan the QR code we'll schedule a meeting at your convenience.

STEP 2

Get Your Risk Profile



We understand your goals, timeline, and risk appetite to design your personal plan.

STEP 3

Start Your Financial Journey



We execute and manage your portfolio and keep you updated with your goals every step of the way.

Scan to Connect on WhatsApp & Book a Free Consultation

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A 407 - Shilp Aaron , Sindhu Bhavan Marg ,
Opp Armieda Complex , Ahmedabad-380054

+91 75 6 75 630 20
+91 75 6 75 630 20
Info@accuratewealth.in
www.accuratewealth.in

AMFI ARN-272604

AMFI-Registered Mutual Fund & SIF Distributor