

PROFILE:-

Before reaching to my profile, I wish to narrate about my self.

I believe as I have basic characteristic like good speaker, well personality, aggressiveness, dedication and honesty, sincerity, perfection and punctuality in work and more importantly am having very good exposure with Life Insurance Advisors with whom I had associated for 32 years.

Let's go to my profile.

➤ NAME :- VIRAN PATEL

➤ EDUCATION: -

- ❖ AICMA (Cost & Management Accountant), Calcutta, India.
(Previously called as Cost Accountant)
- ❖ M.COM (Accounts & Finance), M S University of Vadodara, India
- ❖ D.T.P. (Diploma in Taxation Practice), M S University of Vadodara, India.
- ❖ NCFM & NISM Modules :- Mumbai, India.
(NSE Certification in Financial Market – by National Stock Exchange, & National Institute of Securities Markets – by SEBI)
 - Mutual Fund Distributor module - 84 %
 - Financial Market Module - 93 %
 - Debt Market Module – 67 %
 - Investment Analysis and Portfolio Management Module – 89 %
 - Option Trading Strategies Module – 92 %
 - Certified Personal Financial Advisor – 71 %
 - SEBI Investment Advisor – Level 2 – 61 %
 - NSE Certified Market Professional – Level 1 Certification
 - India's 1st Certified Financial Guardian
 - Rebalance Volatility Certified Course
 - NISM XXI-A Certified for PMS

➤ EXPERIENCE:

- ❖ I had been with LIC OF INDIA since 1989 as Regular Faculty Member of Agent Training Centre for training to New and Regular Life Insurance Advisors. I was also Guest Faculty Member in Central Office – LIC of India training center at Alkapuri, Vadodara, where I was delivering lecture on Financial Planning and Human Life Value to Top Advisors of Gujarat & New Development Officers. I have trained More than 5000 Life Insurance Advisors.
- ❖ Have exposure of Computer Accounting, Computation to Income Tax and preparation of ITR, TDS and Tax Audit for 8 Years in CA Firm.

➤ **HOBBY:** Traveling, Sport (Swimming, Athletics (participated in Marathon, 5 times winner in LIC Athletic Meets), Interaction with People. Regular Study of Various Investments Magazines, Books and related materials.

➤ **MY CAREER:**

- ❖ I am Managing Director & CEO of **PATEL Global Finserv (OPC) Private Limited**
- ❖ I was Co-Founder of “**PATEL Financial Services**” having AMFI Certified Mutual Fund & NISM XXI-A PMS Distributorship and having very good exposure of Financial Markets for 32 Years.



Let's Shake Hands

The image shows two business cards for Patel Global Finserv (OPC) Private Limited. The top card is white with orange and blue text. It features the company logo, which is a globe with a bar chart inside, and the text "India's 1st Certified Financial Guardian Company". The name "Viran Patel" is prominently displayed as CEO & Managing Director. Contact information includes a phone number (+91 98254 20200), an email address (patelglobalfinserv@gmail.com), and a website (www.patelfinancialhub.com). A blue banner at the bottom of the card reads "Where Financial Discipline leads to Financial Freedom".

India's 1st
Certified Financial Guardian Company

Viran Patel
CEO & Managing Director

Patel GlobalFinserv
(OPC) Private Limited
AMFI Registered Mutual Funds Distributor
Regd. MSME (Govt. of India)

+91 98254 20200
patelglobalfinserv@gmail.com
www.patelfinancialhub.com

Where Financial Discipline leads to Financial Freedom

OUR VALUE ADDED SERVICES :

- Saving | Regular Income
- Wealth Creation
- Tax Savings
- Children Future Dreams
- Comfort Retirement



Head Office :
"Shree Hari", 6/2, Amin Park Society,
Nr. Avdhut Fatak, Vishwamitri Road,
Manjalpur, Vadodara - 390 011
Gujarat, India.

Overseas Office :
Vedant Patel
2709, 22 John St, York,
Ontario, M9N0B1, Canada
Cell No : +1 (437) 223-1557

Where Financial Discipline leads to Financial Freedom