



PANDEY iINVESTMENTS



Mr. Rajeev Kumar Pandey
Founder & CEO: Pandey Investment



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Education Qualifications:

- B.Sc, L.L.B
- AMFI Registered Distributor
- Certified Mutual Fund Distributor (NISM Certification)

Professional Background:

- Ex Sr. Branch Manager, Zila Sahkari Bank LTD
- Over 20 years in banking, investment, and financial services (serving since 2000)

Overview:

Mr. Rajeev Kumar Pandey is a trusted financial advisor and AMFI-registered mutual fund distributor with over 23 years of experience in the financial services industry. He specializes in providing personalized investment solutions, mutual fund distribution, and wealth management services to individuals, families, and businesses across Lucknow and surrounding regions he also provides expert advice on health insurance plans to ensure comprehensive financial protection.

Core Values:

- Trust, Empathy, and Professional Integrity
- Deep expertise in mutual funds and financial planning
- Commitment to continuous education and ethical advice

Contact Information:

- Mobile: 9838638369, 9415459218
- Email: rajeev2010p@yahoo.com



Commitment to Ethics :

- Adheres strictly to AMFI Code of Conduct
- Prioritizes client interests and confidentiality
- Provides regular updates and portfolio reviews
- Ensures all recommendations are suitable and compliant

Personal Philosophy

Mr. Pandey believes that:

“Client trust must be earned every day through honesty, expertise, and dedication to their financial success.”

Professional Quotes & Mantras

“Wise spending is part of wise investing. And it’s never too late to start.” — Rhonda Katz

"Overall, there is no better time to start thinking about that path than today." Investments take time to grow, so starting early is crucial.

— Warren Buffett

Message for Clients

"Start early, be patient, and let your money grow. Financial planning is a journey, and together, we achieve your goals."



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Services Offered

Investor Education: Educating clients on different types of mutual funds, their features, benefits, risks, and helping them understand how mutual funds work for informed decision-making.

Assessment & Recommendation: Assessing an investor's financial goals, risk tolerance, and investment horizon to recommend suitable mutual fund schemes aligned with their profile.

Facilitating Transactions: Assisting investors in purchasing mutual fund units, redeeming holdings, switching between schemes, and completing all related paperwork and digital formalities.

Ongoing Support: Providing continuous support post-investment, including portfolio reviews, performance updates, addressing queries, and helping clients adjust their investments as needed.

Compliance Assistance: Supporting clients with non-financial service requests like updating KYC, nominee changes, bank detail updates, and ensuring regulatory compliance.

Building Client Relationships: Establishing trust and maintaining transparency, acting as a reliable point of contact between investors and mutual fund companies.