



**Get In Touch**

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**Make it happen**  
**In life**



# We have you **COVERED**

With over a decade of experience in life insurance, health insurance, general insurance, and mutual funds..Our experiece as a Financial Architect to thousands of families and large corpoptates has made us the perfect choice for all your insurance and investment needs.

## Our History

We got our first broker's license from LIC in 2009, and now in 2021, we have tie-ups with the largest insurance providers for multiple types of insurance covers for retail as well as corporate clients.



**2009**

### **company was founded**

We started in one room back in 2009 with a dream to fulfil the financial goals of our clients.



**2013**

### **started our first office**

Our first big milestone, with our first office in Pratapnagar, Vadodara. We also had our first team, committed to make a difference together.



**2020**

### **moved to a larger office**

With our consistent growth in clients and milestones, we needed a bigger team for our fast growing company.



## About Us

**Chirag Vyas Financial Architect (CVFA) is not just an insurance agency. It is the one place for your solutions to investment, and insurance.**

With over 3,000 individual clients, as well as over 200 corporate accounts. CVFA is a firm that specializes in custom solutions for corporates. These solutions come with affordable premium rates and in-source compliance. The firm has achieved national and international repute in its ten years of successful operation. In this time-frame, the firm has also added several important qualifications, including Million Dollar Round Table (MDRT) and the Court of Table (CoT) associations. The firm is itself a premier associate for financial professional across the globe and has been continuing its meteoric rise in the world of financial architecture.

## What We Do?

We don't just hand out insurance policies. We begin by scrutinizing all existing policy documents and prepare a comprehensive chart details the future cash flow projections. Once ready, we sit with the client to understand their own needs. We then gather all this data and come up with multiple suggestions that help achieve the clients' goals and suggest ways to fill existing gaps in their policies.



**Our comprehensive chart is our unique way of mapping out the client's future cash flow and financial needs. This one document can help you get a bird's eye perspective on all your investments.**

### We also offer the following services for our corporate clients.

- 01 Annual Seminar By a Certified Dietician
- 02 Lecture on Financial Literacy
- 03 Annual Health Checkup\*
- 04 Annual Dental Checkup\*

\*Terms & Conditions Apply

# Meet Our Team

We believe in working hard to achieve your goals. Our vision is to provide a level of commitment that is unmatched. Meet our team who shares this vision of ours and works together so you can live a comfortable and financially free life.



**Chirag Vyas**

*Managing Director*

*Through proper financial planning and investment, make it happen in life.*



**Hardik Amin**

*Claims Specialist*

*We wish our clients never have to claim, but I'm glad to be there for them in their time of need.*



**Pritesh Patel**

*Operations, Back Office*

*Handing out policies requires immense processing and paper work. Everything needs to perfectly in order.*



**Pinal Vyas**

*HR Head*

*Delivering quality services is a team effort. Enabling the team ensures our commitment.*



**Anju Patel**

*Renewals*

*Ensuring policies do not lapse is immensely critical. With timely reminders and follow-ups, our clients never miss renewals.*



**Janvi Soneja**

*MF Division*

*Mutual Funds are the easiest way to generate wealth over long term. Regular profit booking and continuous hand holding helps me achieve your targets.*

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**It's not how much money you make, but how much money you keep, how hard it works for you, and how many generations you keep it for.**

**-Robert Kiyosaki**

# What We Offer

Chirag Vyas started his journey as an LIC Insurance Agent, and slowly expanded into Health Insurance and Corporate Risk management. With our keen investment insights and client requests, we also began mutual fund and portfolio management services. Our aim has always been customer first. Every service we offer is to increase the financial freedom of our customers.



**Life Insurance**



**Health Insurance**



**Mutual Funds**



**General Insurance**



**Corporate Risk  
Management**



**Portfolio Management  
Services**

# Awards

Achieved Million Dollar Round Table **16 Times**

Achieved Court Of the Table **3 Times**

**3 Years Corporate Club Member**



## Million Dollar Round Table (MDRT)

MDRT members demonstrate exceptional professional knowledge, strict ethical conduct and outstanding client service. MDRT membership is recognized internationally as the standard of excellence in the life insurance and financial services business.



## Corporate Club Member

The highest title awarded by LIC. Today, over 12 lakh agents are working with LIC, but only 150 agents have had the honor of this title.



## Court Of the Table

The Court Of the Table achievement requires 3 times the qualifying requirements of MDRT. Which makes it 3 times as difficult to achieve. Very few professionals have the privilege of this title.

# Why Choose Us

We have always thought about the future of our clients. But to serve their ever increasing needs, we need to grow with them. CVFA has always been a company that looks forward for a better tomorrow. With the new digital age, we have now started offering a range of digital services. CVFA clients can now download our app to stay on top of their investments. We will soon launch our website that will not only offer the list of services, but also provide our clients with real time data about their investments and much more. The future is digital and we are ready.



**Android & iOS Application**



**Monitor your investments on our website**



**Automatic Renewal Reminders**



**Compare policies from various providers**

Wealth development is done in multiple stages. It is like a pyramid. The bottom of your pyramid needs to be strong that protects your finances. Then comes the risk-free growth level, where we grow your wealth with minimal risk. It is only then when you can afford growing with risk, which is the next level of the pyramid. Finally you can advance to the level of high growth and ultimately make speculative investments with your leftover income.

- ✓ Comprehensive Investment Chart
- ✓ Need Analysis of Clients
- ✓ Regular Portfolio Monitoring

- ✓ Dedicated Claim Handling Team
- ✓ Corporate Risk Assessment
- ✓ Tailor-made solutions with inexpensive premium rates



**300+ Crore Insurance Inforce**

**200+ Corporate Clients**

**3000+ Individual Families**

**100% Genuine Claim Settlement Ratio**

## Client Testimonials

We place immense importance on client feedback. Our mission is to always provide all our clients with the best of services. They entrust with their savings, and future, and we want to make them feel proud of their choice. Here are a few testimonials from our clients.



**Tejal Desi**  
Director, DEPL

Chirag Vyas has provided years of service for all our professional as well as financial needs. They are a one stop solution into insurance and investments with highly knowledgeable workforce that are equipped to find the best deals. We are proud of our association and look forward for continued business.



**Pragnesh Panchal**  
AVP Federal Bank.

Chirag Vyas is a true architect of the financial world. He has the ability to understand one's goals and dreams and convert them into reality through high financial knowledge. We have been associated for almost a decade and he has always provided me with the best of solutions.



**Vijay Mulchandani**  
MD Riverside Industries

Chirag Vyas has a wide skillset when it comes to Financial Services. What started as an Insurance Policy for my company has now become a huge investment portfolio for myself and my family. We have gained tremendously with his help. Thank you Chirag.

## Our Clients

We serve a numerous clients from individuals to large corporates. Our one stop investment and insurance services are ideal for anyone looking for financial services. Here are a few of our corporate clients.



“

Investment is science and Science work's on a principle. Violation of Science law can accure Big Accident”  
-R Gopinath