

WIN INVESTMENTS

Empowering with expert advice

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AN INTRODUCTION OF WIN Investments

Our firm, **WIN Investments** was **established by Ms. Sonia Gulati, Ex research associate – IIT Hyderabad, in December, 2017** in **Delhi NCR** with the objective of rendering professional services of the highest standard to clients. With this motto, we continue to grow and expand in our endeavour to exceed expectations of clients.

We, at WIN Investments, continuously strive for perfect unification of professionalism with high standards of services adherence to our values and our mission, of adding value to every responsibility bestowed upon us. We are team of qualified & experienced professionals who add value & optimize the benefits accruing to clients, everyday.

Ms. Sonia Gulati, founder of WIN Investments is a **registered mutual fund distributor and tax expert with over 18 years of experience**. She holds Master's degree of Science (MSc) in Mathematics and has worked as a research associate with **IIT Hyderabad**. She has expertise in advising tailored financial solutions to the investors based on the assessment of investment horizons, risk appetite and financial goals in the most tax efficient way.

Given the experience of Ms. Sonia & her supportive team, the firm has been offering services in the areas of taxation, investments (through mutual funds, insurance, bonds, fixed deposits, ULIPs etc.), legal drafting, book keeping and Virtual CFO services.

Over the years, WIN Investments has assisted its clients in efficient tax planning, tax compliances, financial planning, risk management through appropriate mix of financial solutions.

OUR VISION AND MISSION:

With 'Quality is Priority' as an ultimate aspiration, our vision is to be a reliable partner to our customers in their journey of attaining financial freedom while being competitive, dynamic and focused in the areas of operation, providing the best opportunity to progress and serving in the best interests of the clients.

OUR VALUES:

Our Firm has following principles:

1. Innovation And Excellence;
2. Loyalty and Commitment;
3. Integrity and confidentiality;
4. Passionate and positive culture;
5. Courageous and Respectful;
6. Team work;
7. Goal oriented;
8. Customer satisfaction.

We believe that for delivering best quality services efficiently, the values system should be in place and shall be adhered to by all the members of the team.

OUR TEAM:

Our team consists of various professionals having vast knowledge of investment products (incl. Mutual Funds, Insurance, Bonds, Fixed Deposits, ULIPs, Endowment Plans etc.) and Taxation related matters. Being led by Ms. Sonia Gulati, our team includes professionals having experience of over 20+ years in their respective fields.

OUR SERVICES:

The firm is engaged in the activities in the line of Corporate Law, Tax Advisory, Tax Compliances, Book Keeping, Mutual Fund Distribution/Advisory, Insurance (both life and non-life) distribution, Corporate / Tax Saving Bonds, Fixed Deposits, Legal Drafting, Management Consultancy services along with wide range of associated sub activities.