

PROFILE



The Company

Beyond Life was born 10 years ago in 2003 when Ravi was looking at more challenging opportunities to expand his brokerage business. He spotted a gap in the delivery of holistic financial advice and thus set up Beyond Life, which looks at all the scenarios for the client, and delivers appropriate solutions. Thus came about the association with LIC, India's largest insurance provider and there has been no looking back ever since.

In addition, making the service offering more robust, Beyond Life has an association with NJ Funds, one of the largest mutual fund distributors in the country as well as portfolio management with Unifi Capital, a Chennai based SEBI registered PMS manager.

Today, Beyond Life has a total staff strength of 35 with three offices in Mumbai and is growing rapidly. Sales and service teams, to ensure complete client satisfaction, support the company. Beyond Life is a registered sub-broker of the BSE and is certified by the IRDA as well as AMFI.

Our Service Offering

We understand no two individuals are alike and hence tailor-make our investment strategy and plans to meet your different needs. In simple words, we partner you with your financial planning & investment decisions to manage your life priorities.

Our area of expertise spans across the following products

- Life Insurance
- Health, Disability, Critical Illness
- Mutual Funds
- Portfolio Management Services
- Direct Equity
- Structured Products
- Off-shore Investment Products
- Art

Our Methodology

We follow a three-step approach

1. Profile Mapping

- Understanding client goals & objectives
- Risk appetite analysis
- Need gap analysis

2. Recommendation & Proposal

- Asset Allocation
- Product recommendations
- Terms of engagement

3. Review & Monitor

- Regular tracking & monitoring updates
- Research recommendations
- Rebalancing suggestions based on changing life priorities

About Ravi

Ravi Jethani is the founder and director of Beyond Life with over 15 years of experience in the financial investment and advisory arena. His love for numbers & entrepreneurship spirit led him to the stock exchange in his college days. He went on to be a Registered Financial Consultant (RFC) with the International Association of Registered Financial Consultants (IARFC) and is also certified by the Association of Mutual Funds of India (AMFI). He is currently pursuing a Certified Financial Planner (CFP) certification.

He is also a member & top of the table at the Million Dollar Round Table (MDRT) which is a premier association of The Top 1% of Financial Professionals worldwide, based out of USA.

In addition to developing financial solutions for his clients, Ravi is also actively engaged in educating and training financial advisors through workshops & seminars.

Ravi is also passionate about music and art and pursues these interests actively. He lives with his wife and two children in Mumbai. He can be contacted on: ravi@beyondlife.in

Contact Us

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For more information, please visit www.beyondlife.in