INVESTADVISE
WEALTH MANAGEMENT SOLUTIONS
AN ISO 9001:2008 COMPANY

WEALTH & REAL ESTATE ADVISORY EXPERT

Varun Rastogi

17+ YEARS OF INTERNATIONAL EXPERIENCE (INDIA | UK | QATAR)

EMPOWERING

NRI'S TO BUILD WEALTH GLOBALLY

GUIDING NRIS TO SMARTER INVESTMENTS, WORLDWIDE.

DIRECT0R -INVEST ADVISE WEALTH MANAGEMENT

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Every milestone reflects the futures we shape together

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Sachin Gupta
Founder & CEO

About
Invest Advise Wealth Management

At Invest Advise Wealth Management, we have been empowering individuals, families, and businesses to achieve financial security and growth since 2012. Guided by a client-first philosophy and a team of seasoned financial experts, we design personalized wealth strategies aligned with your goals, aspirations, and lifestyle.

Our expertise spans across:

- **Investment Management** – Curating portfolios for sustainable growth.
- **Retirement Planning** – Ensuring peace of mind and financial independence.
- **Estate & Real Estate Planning** – Preserving wealth for future generations.
- **Tax Strategies** – Maximizing efficiency and minimizing liabilities.
- **Risk Management** – Protecting assets with smart, resilient solutions.

Whether you aim to grow your wealth, safeguard your legacy, or create new opportunities, we provide comprehensive, end-to-end solutions that guide you at every stage of your financial journey.

With over a decade of proven expertise, our agency has also become a leading name in luxury real estate marketing, specializing in India's most prestigious waterfront and high-value properties. Choosing the right advisor and agency is critical for success—and at Invest Advise, we measure our success by yours.

Trust. Transparency. Transformation.

From the Director Desk

Wealth, to me, has never been just about numbers on a balance sheet. It is about trust that endures, vision that inspires, and the confidence to build a secure and meaningful future. Over the years,

I have realized that true wealth is measured not merely in financial growth but in the peace of mind and empowerment it brings to people's lives.

My professional journey of more than 17 years across India, the United Kingdom, and Qatar has been shaped by rich experiences with global organizations and diverse markets. These opportunities gave me a deep understanding of how businesses scale, how trust is built across borders, and how strategies translate into lasting value.

When I returned to India in 2015, I carried with me a vision — to transform the way wealth management and real estate consulting were delivered to NRIs and HNIs. This vision gave birth to Invest Advise Wealth Management, a firm rooted in three uncompromising values: transparency, ethics, and client-first service.

At Invest Advise, we don't just provide advice — we build lifelong partnerships. Whether it is guiding a family toward financial independence, curating real estate opportunities, or helping investors diversify their portfolios, my mission has always been clear: to ensure that every decision is well-informed, ethical, and aligned with long-term goals.

The future of wealth management is personalized, digital-first, and global. As we move forward, my commitment is to continue building an ecosystem where clients feel confident, empowered, and secure about their investments — no matter where in the world they are.

This portfolio is not just a reflection of my journey, but also an invitation to join hands in creating a future where wealth serves a greater purpose: building trust, enabling growth, and shaping legacies that last generations.

Varun Rastogi

The Journey of Confidence and Clarity

I was born in India, where the values of trust, integrity, and hard work were instilled in me from an early age. Those values became the compass that guided me throughout my personal and professional life.

My foundation was built as an engineer, where I learned the art of problem-solving, precision, and discipline. Yet, I always knew my path would extend beyond codes and systems — into understanding people, businesses, and the way trust shapes relationships.

That path took me across borders, into the world of global corporate leadership. With Fortune 500 companies such as Dell, Steria, Marks & Spencer, Boots, and Sidra, I honed my skills in technology, strategy, and client engagement. These experiences gave me a rare global perspective on how businesses scale, how trust is earned, and how strategies succeed in competitive environments.

In 2015, I returned to India, carrying not just international experience but also a vision — to transform the way wealth management and real estate advisory were delivered. What began as Dream Houz soon evolved into Invest Advise Wealth Management, a brand built on the same values that shaped me: transparency, ethics, and client-first service.

Today, Invest Advise stands as a trusted partner for NRIs and HNIs worldwide, helping them build wealth with confidence and clarity. My journey has been one of learning, adapting, and staying true to a belief: that wealth is more than money — it is trust, vision, and security for the future.

My approach is simple yet profound: to help clients build wealth that endures across generations, not just seasons. Whether it's curating a portfolio, identifying the right real estate opportunity, or planning for succession, I ensure that each step leads to sustainable, purposeful prosperity.

PHILOSOPHY OF WEALTH

To me, wealth is more than currency — it is freedom, trust, and security woven together. True prosperity is not measured in digits, but in the confidence it gives you to shape your future and the legacy it leaves behind.

I believe that money only holds true meaning when it is tied to a purpose. Wealth, in its essence, is not about accumulation but about empowerment — the ability to make choices, to create security, and to design a life of meaning. Investments must go beyond profits; they should be aligned with life's deeper goals: stability for today, growth for tomorrow, and peace of mind for the future.

At the core of my philosophy lies one uncompromising principle: advice must always be ethical, transparent, and client-first. Numbers may grow and markets may fluctuate, but values remain constant. For me, wealth is not built in haste or through shortcuts — it is built patiently, brick by brick, on the foundation of trust and integrity.

This is why every recommendation I make, every strategy I design, and every partnership I forge is guided by a single thought: Will this serve the client's long-term vision? Because true wealth is not about chasing trends; it is about creating legacies.

True wealth is not measured in profits, but in the purpose it serves.

Global Corporate Career

My corporate journey began with a single step into the world of technology — and soon expanded into a global adventure across industries, cultures, and leadership roles. Each chapter taught me something unique about business, people, and the universal language of trust.

At Dell Services, I was immersed in the fast-paced world of sales leadership and marketing, where technology wasn't just about systems — it was about solving human problems at scale. I learned how to craft solutions that mattered, how to build credibility, and how to drive growth with innovation.

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At Steria, I found myself at the heart of business transformation projects, helping organizations reimagine processes, adopt change, and adapt to new realities. It was here that I discovered the power of strategy — not as a document, but as a living practice that shapes outcomes.

The UK opened a new chapter with Marks & Spencer and Boots, iconic retail brands where I gained firsthand insight into large-scale operations and customer engagement. The experience taught me that no matter how big the business, success always comes down to one thing: understanding people.

Finally, in Qatar, my work with Sidra placed me in international cross-border roles, strengthening my ability to navigate diverse markets, manage cultural nuances, and deliver results in truly global settings.

Guiding NRIs to Smarter, Safer Investments

At Invest Advise Wealth Management, our services go far beyond transactions. We see every engagement as the start of a lifelong partnership, one built on trust, clarity, and a shared vision for the future. Our mission is simple: to help clients not just grow their money, but to secure their lives, their families, and their legacies.

Our approach rests on four strong pillars. First, NRI Wealth Management, where we design smart strategies for portfolio diversification, balance risk with precision, and create steady asset growth tailored to global lifestyles. Second, Real Estate Consulting, where we carefully handpick projects with India's top developers — each one backed by deep research, proven quality, and long-term value. Third, Holistic Advisory, because true wealth is about more than returns; it's about protecting assets, planning for the future, and building a legacy that lasts generations. And finally, our foundation: Ethical Advisory.

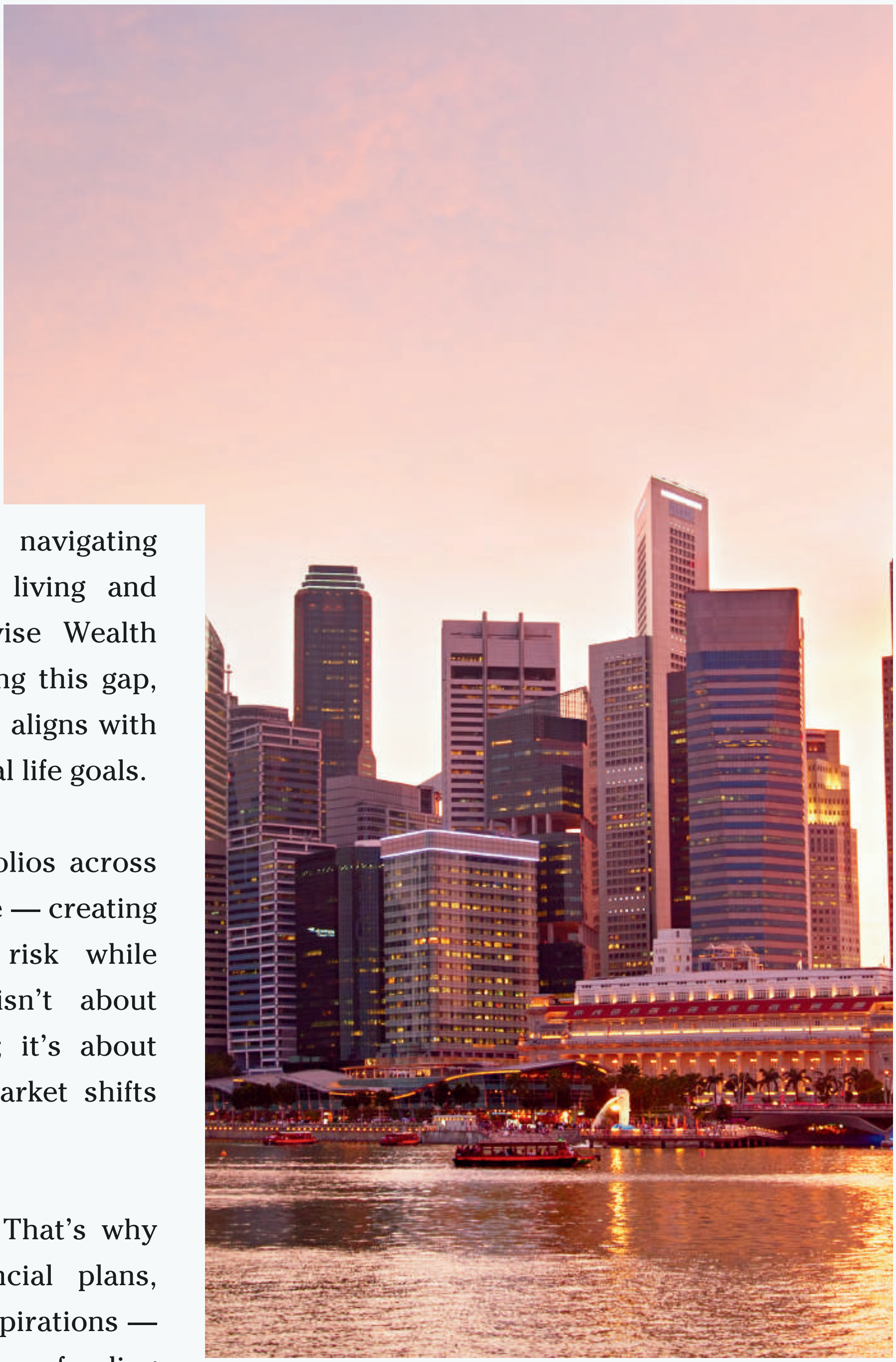
Here, transparency is non-negotiable. We never recommend anything we wouldn't confidently invest in ourselves, because trust is the strongest currency we deal in.

Each of these pillars is carefully designed to complement the other. A strong financial portfolio loses its meaning if real estate is neglected, while property investments need the balance of a diversified wealth plan. Legacy planning is incomplete without ethics, and ethics fall flat if not supported by solid, research-backed advice. At Invest Advise, we weave all these aspects together into a cohesive strategy, ensuring that every decision you make fits seamlessly into the bigger picture of your life.

What truly sets us apart is the way we view wealth as a journey, not a destination. We walk alongside our clients through every stage — from the first investment to creating a generational legacy. Whether it's guiding a young professional taking their first steps abroad, a family safeguarding assets, or seasoned investors expanding portfolios, our role remains constant: to be a trusted partner, advisor, and friend in the wealth-building journey.

BEYOND NUMBERS, TOWARDS CONFIDENCE

Managing wealth is not just about growing assets — it's about building confidence, stability, and freedom across borders.



For NRIs, the challenge is unique: navigating investments in one country while living and earning in another. At Invest Advise Wealth Management, we specialize in bridging this gap, ensuring that every financial decision aligns with both global opportunities and personal life goals.

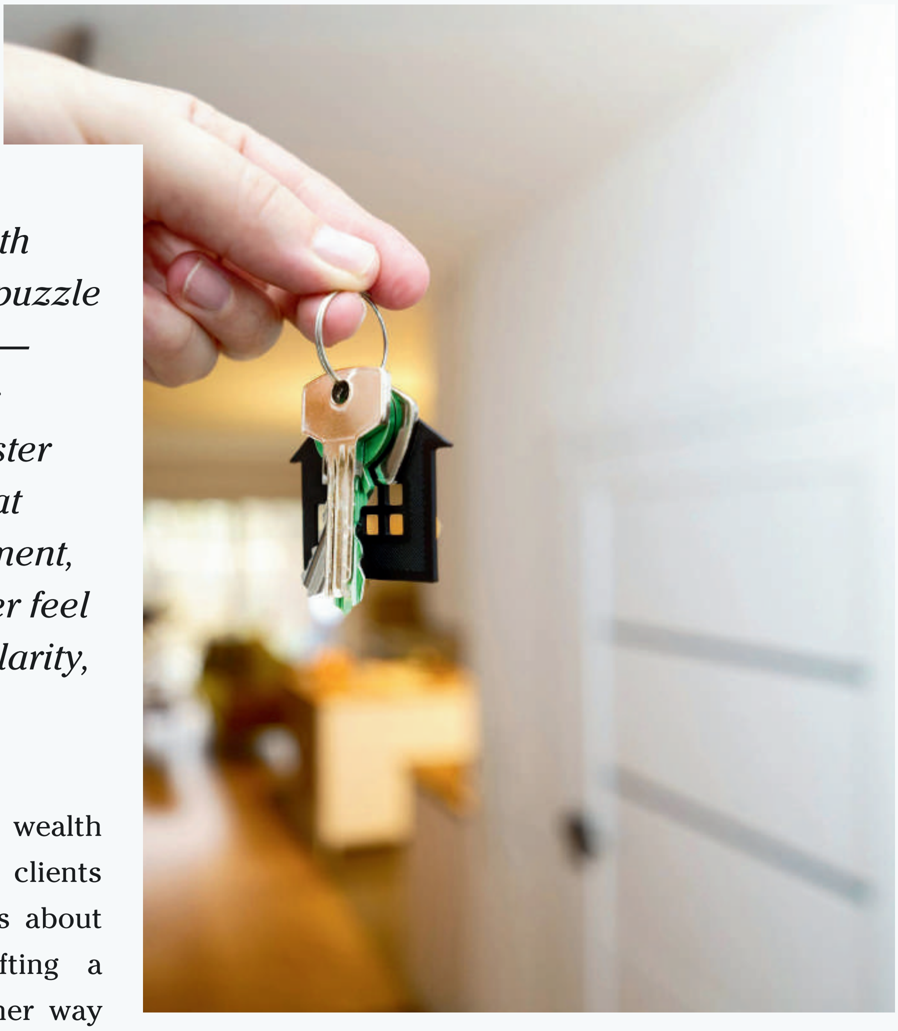
We help clients diversify their portfolios across equities, mutual funds, and real estate — creating a balance that protects against risk while unlocking long-term value. This isn't about chasing trends or short-term gains; it's about designing strategies that weather market shifts and stand strong across decades.

But wealth is never one-size-fits-all. That's why our focus is on customized financial plans, crafted to suit each client's unique aspirations — whether it's securing a family's future, funding education abroad, planning retirement, or building generational wealth. Every plan is more than a financial roadmap; it is a personalized blueprint for peace of mind.

What truly defines our wealth management approach is the belief that money must serve life, not the other way around. By combining global exposure, deep research, and a client-first philosophy, we don't just protect and grow assets — we create the confidence that comes from knowing your wealth is working as hard as you are.

True wealth is built on clarity, balance, and confidence.

Wealth Management: Turning Complexity Into Clarity



For most NRIs, managing wealth across borders can feel like a puzzle with too many moving pieces — currencies fluctuating, markets shifting, and rules changing faster than they can be tracked. But at Invest Advise Wealth Management, we believe wealth should never feel like chaos. It should feel like clarity, balance, and confidence.

That's why our approach to wealth management is not about throwing clients into products or chasing trends. It's about listening, understanding, and crafting a strategy that fits life — not the other way around. Whether it's a young professional making their first overseas investment, or a seasoned entrepreneur planning a legacy, we bring structure to ambition and turn complexity into a clear path forward.

Our strength lies in diversification with purpose. From equities and mutual funds to real estate and alternate assets, we ensure every portfolio is balanced — not just for today's growth, but for tomorrow's uncertainties. We don't just help clients earn; we help them protect, preserve, and grow their wealth for generations.

But numbers alone don't build confidence. That's why we design personalized financial blueprints that align with each client's story — their children's education, a dream home in India, retirement by the sea, or leaving behind a lasting legacy. When money is tied to purpose, every investment becomes more than a figure; it becomes a step toward a life goal.

At the heart of it all is one simple truth: money must serve life, not the other way around. And that is why clients across the UK, Middle East, Singapore, and North America trust us — because our strategies aren't just financial plans, they're life plans disguised as portfolios.

HOLISTIC ADVISORY: WEALTH WITH A WIDER VISION

Most people think of advisory as numbers, reports, and spreadsheets. But at Invest Advise Wealth Management, we believe true advisory is about life, legacy, and the future you dream of creating. Wealth is not just about growing assets — it's about making sure those assets are protected, diversified, and passed on with confidence.

That's where Holistic Advisory comes in. We look at the bigger picture — every stage of life, every aspiration, every risk — and craft strategies that ensure your wealth works seamlessly across them all. From retirement planning that gives you freedom without compromise, to asset diversification that cushions against uncertainties, we design financial blueprints that evolve as life does.

But the heart of Holistic Advisory is about legacy. True wealth is not what you keep, but what you can pass on. Through carefully planned wealth transfer strategies, we help families ensure that assets move smoothly across generations, preserving both value and harmony. Coupled with risk management, our clients gain not only financial security but also the peace of mind that their tomorrow is shielded against life's unexpected turns.

We don't see this as advice; we see it as guardianship of your financial story. Every plan we build is designed to balance growth with protection, ambition with caution, and today's dreams with tomorrow's responsibilities. Because real wealth isn't just about living well now — it's about ensuring that your story continues, strong and secure, for generations to come.

Holistic Advisory is not advice — it's guardianship of your financial story.

Global Presence: Trusted Across Borders

Wealth has no boundaries, and neither does our commitment. At Invest Advise Wealth Management, our advisory footprint extends across the globe, guiding NRIs in every corner of the world to invest with confidence and clarity.

From the bustling financial hubs of the United Kingdom, to the thriving expatriate communities of the Middle East, from the fast-growing markets of Singapore to the dynamic wealth corridors of North America — our services have been trusted by clients seeking both security and growth.

Each region brings unique opportunities and challenges, and our strength lies in bridging the global with the local. We understand the aspirations of NRIs living abroad, the emotional connection they maintain with India, and the need for transparent, research-backed advice they can rely on from miles away.

And this is just the beginning. With technology, digital-first advisory, and a growing network of partners, we are continuously expanding worldwide, reaching new markets and empowering more families to transform their wealth into legacies that last generations.

TRUST WILL REMAIN OUR GREATEST CURRENCY, AND BY 2030, I SEE US STANDING AS THE PARTNER OF CHOICE FOR NRIS ACROSS CONTINENTS WHO WANT MORE THAN ADVICE — THEY WANT CONFIDENCE, CLARITY, AND LIFELONG PARTNERSHIP.

By 2030, the way the world thinks about wealth will be unrecognizable. Lines between countries will blur, technology will redefine access, and clients will expect solutions that are not just financial, but deeply personal. At Invest Advise Wealth Management, we are not preparing to follow that future — we are preparing to lead it.

My vision is to make Invest Advise the most trusted NRI advisory brand globally, a beacon of ethics, transparency, and client-first service.

Vision 2030: Redefining Wealth for a New Era

But above all, Vision 2030 is about people. I believe the next decade will transform the role of advisors. No longer salespeople chasing targets, they will be custodians of trust, partners in growth, and architects of legacies. My mission is to mentor and inspire a new generation of advisors who will carry this philosophy forward, ensuring that the values of ethics and integrity remain timeless, even as the tools evolve.

Vision 2030 is not just about scaling a company — it is about reshaping an industry. It is about creating a future where wealth is not measured only in balance sheets, but in security, purpose, and legacy.

Technology will be the backbone of this journey. By creating a digital-first ecosystem, we will give clients the ability to make smarter, faster, and more informed decisions wherever they are in the world. Data-driven insights, AI-powered strategies, and seamless platforms will ensure that wealth management is not a privilege, but an empowered experience for every client we serve.

Thought Leadership: Principles That Shape My Path

FOR ME, WEALTH HAS NEVER BEEN THE DESTINATION — IT IS THE MEANS TO LIVE WITH PURPOSE


Every strategy, every decision, and every piece of advice I offer is grounded in a set of beliefs that go beyond business and reach into life itself.

I believe that wealth should serve life goals, not the other way around. Money is a powerful tool, but its true value lies in how it enables dreams, creates freedom, and secures the future. An investment without a purpose is just a number; an investment tied to life's aspirations becomes a legacy.

I believe that transparency builds long-term trust. In a world where hidden agendas and quick wins can tempt many, I choose to lead with clarity and openness.

Trust is not built overnight — it is built one honest conversation, one ethical decision, and one transparent action at a time

I believe that ethics must always come before profit. Wealth without values is fragile, but wealth built on integrity endures. For me, success is not measured by how much I gain, but by how responsibly I help others grow.

And finally, I believe that tomorrow must always be better than today. Growth, both personal and professional, is about constant improvement. Every client interaction, every partnership, and every strategy should move us closer to a stronger, safer, and more meaningful future.

These are not just principles — they are the compass of my journey, guiding every choice I make. They remind me that true leadership is not about titles or achievements, but about leaving behind a path others can follow with confidence.

An investment without a purpose is just a number; an investment tied to life becomes a legacy."

Education & Skills: The Foundation of Expertise

Behind every successful advisory lies a strong foundation of knowledge and skill. My academic and professional training have given me the tools to think strategically, act decisively, and deliver results that stand the test of time.

A strong foundation in technology and business gives me the edge to lead with clarity.

Education

My learning journey began with a B.Tech in Electrical & Electronics from KIET, where I developed problem-solving skills and the discipline of structured thinking. This technical background became my early training ground in precision, logic, and execution.

To complement this with a global business perspective, I pursued an Executive MBA from the University of Kent, UK, specializing in Sales, Banking, and Financial Services (BFSI). The MBA broadened my horizons, equipping me with the ability to lead, manage change, and understand the complexities of global financial systems.

Over the years, education merged with experience to shape a skillset that defines my career today:

- Strategy & Market Growth – Crafting long-term visions and positioning businesses for sustained success.
- Wealth & Investment Advisory – Helping clients build, protect, and diversify their wealth with confidence.
- Real Estate Consulting – Identifying opportunities, curating projects, and building portfolios backed by research and growth potential.
- Test Engineering & Technology – A solid technical base that sharpens analytical thinking and problem-solving.

Awards & Recognition:

Titles fade, but trust endures — and that is the greatest reward of all

Every recognition is more than a trophy — it is a reminder of the values that guide my journey: ethics, transparency, and client-first service. Each award is not just a personal achievement, but a blessing that reflects the trust of clients, the hard work of my team, and the vision of building something greater than myself.

- **Most Promising Industry Leader – Wealth Management (2023)** – Business Mint recognized our commitment to building ethical, transparent, and future-ready financial strategies.

- **Most Enterprising Leader – Real Estate & Finance (2022**) – ET Now honored our innovative approach in blending wealth advisory with real estate excellence.

- **Most Influenced Entrepreneur of the Year (2021**) – Awarded by Zee Business for inspiring change and empowering NRIs to invest with confidence.

- **Most Dynamic Entrepreneur of the Year (2020)** – CNN-News18 celebrated my entrepreneurial journey and our impact in transforming advisory services.

- **Most Trusted Overseas Real Estate Consultant (2019)** – A recognition of our deep-rooted commitment to building confidence for NRIs investing back home.

- **Sales Excellence Award (2019)** – Leela Skyvillas acknowledged our results-driven approach while staying true to ethical advisory practices.

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