NIKHIL MEHTA CAPITAL
Investments, Education & Protection
AMFI Registered Mutual Fund Distributor;
IRDA Certified Life & Non Life Insurance Advisor;
Corporate Training
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Profile

Nikhil Mehta Capital is a multidisciplinary team of professionals, including seasoned Chartered Accountants and Finance-focused Legal Advisors—who work in synergy to provide reliable, compliant, and forward-thinking solutions with an unwavering commitment to delivering high-impact and client-centric investment solutions

As an AMFI-registered Mutual Fund Distributor and IRDA-certified Insurance Advisor, we bring regulatory discipline, deep market insight, and strategic foresight to every client engagement.

Offerings:

Our core offerings include distribution and investment advisory services in Mutual Funds, Bonds, Fixed Deposits, and other fixed-income instruments—each selected to align with the financial goals, risk appetite, and lifecycle needs of our clients.

We Provide personalized financial planning & specialize in comprehensive Estate Planning and Succession Advisory, enabling clients to build, preserve, and seamlessly transfer their wealth across generations.

Our solutions are holistic, integrating both asset growth and legacy protection strategies.

Experience:

30 years of experience in the BFSI sector guiding individuals, families, Charitable and Religious Trusts and MSMEs across the full spectrum of financial planning and wealth management.

Over the last two decades, served as a Corporate Trainer and Facilitator having conducted more than 2,500 programs in areas such as Financial Planning, Capital Markets, Insurance, and Investment Education. Conducted programs for banks and other financial entities like mutual fund houses, financial institutions, and government initiatives such as the National Skill Development Corporation (NSDC) and PMKVY, in collaboration with bodies like NISM and CII.

Accreditions:

1. NISM-Series-V-A: Mutual Fund Distributors Certification
2. NISM-Series-VIII: Equity Derivatives Certification
3. NISM-Series-XII: Securities Markets Foundation Certification
4. NISM-Series-XXI-A: Portfolio Management Services (PMS) Distributors Certification
5. NISM-Series-XVII: Retirement Adviser Certification
6. NISM-Series-X-A: Investment Adviser (Level 1) Certification
7. NISM-Series-X-B: Investment Adviser (Level 2) Certification
8. Chartered Trust and Estate Planner - AAFM
9. Certified Personal Financial Advisor
10. Risk Management & Insurance Planning - FPSB
11. Retirement Planning & Employee Benefits - FPSB