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Mr. Josveen J. Menezes

Bridging Financial Excellence with Social Impact

Shweta Singh | The CEO Magazine

Mr. Josveen J. Menezes is a distinguished finance professional, entrepreneur, and social change maker who has successfully combined wealth management expertise with a strong commitment to social impact. With more than a decade of professional experience, he has built a reputation for delivering strategic financial solutions while creating meaningful change in society through philanthropic initiatives.

Currently serving as a Partner at PTI Consultancy and Director at Fortune Life Wealth Private Limited, Josveen has emerged as a trusted name in the financial services industry. His professional journey reflects dedication, strategic thinking, and a client-centric approach focused on helping individuals and families achieve long-term financial security and sustainable wealth creation.

Academically, Josveen holds a Bachelor's degree in Mechanical Engineering along with an MBA in Finance, giving him a unique blend of technical and managerial expertise. He has further strengthened his professional credentials through several prestigious certifications, including Certified Financial Planner (CFP), Chartered Inheritance and Succession Planner, Certified Estate Planner, and AIWMI-Certified Financial Advisor. Additionally, he is an AMFI Certified Mutual Fund Distributor and now an AMFI-registered SIF Distributor as well. These qualifications have enabled him to develop comprehensive and future-ready financial strategies tailored to the evolving needs of clients.

Redefining Wealth Management

What sets Josveen apart is his belief that financial planning extends beyond wealth accumulation. He strongly advocates for financial security, legacy preservation, and long-term life planning. Whether guiding young professionals toward disciplined investing or assisting families with retirement and wealth management strategies, his approach remains



practical, personalised, and vision-driven.

Driving Social Change

Alongside his professional success, Josveen is deeply committed to social service and community welfare. Through Trinity Mannha Service, in association with Snehalaya Charitable Trust, he leads an initiative dedicated to fighting hunger by providing nutritious midday meals to nearly 800 individuals every day. With a long-term vision to sustain this effort for generations, the initiative reflects his commitment to restoring dignity and hope to underprivileged communities.

He has also played a significant role in healthcare support through Trinity Medicare Services, in collaboration with Catholic Sabha Udupi Pradesh and Society of St. Vincent De Paul, Mangalore. This initiative focuses on providing dialysis treatments at concessional rates, making critical healthcare services more accessible to those in need. His ongoing social projects continue to positively impact lives and communities.

A Life Guided by Leadership, Discipline, and Purpose

Beyond finance and philanthropy, Josveen has demonstrated exceptional discipline and leadership in sports. A state-level football player and former captain of his school, college, and university teams, he has represented renowned youth clubs including Mahindra FC and Mumbai City FC. He continues to participate in the Mumbai First Division Football League representing Tiwana Football Club, reflecting his enduring passion for excellence and teamwork.

Mr. Josveen J. Menezes represents a rare combination of professional excellence, visionary leadership, and social responsibility. Through his contributions to finance, healthcare, social welfare, and sports, he continues to inspire others to build success with purpose, integrity, and meaningful impact.