

ORIONEDGE SOLUTIONS LTD
Clarity. Confidence & Growth

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# BUILD WEALTH.
# PROTECT WHAT MATTERS.
# SECURE YOUR LEGACY.

**Your Trusted Partner in Wealth Creation, Protection & Financial Security**

## PROFILE

# BUILD WEALTH. PROTECT WHAT MATTERS. SECURE YOUR LEGACY.

At Orion Edge Solutions Limited, we believe financial success is built through informed decisions, strategic planning, and trusted partnerships. Whether you are building your first investment portfolio, protecting your family's future, planning for retirement, growing your business, or preserving your legacy, we provide expert financial advice and tailored solutions that help you achieve your financial aspirations with confidence.

Our commitment goes beyond financial products—we build lifelong relationships anchored on trust, integrity, excellence, and measurable results. Clarity. Confidence. Growth. Book Your Complimentary Financial Consultation Today





# WHO WE ARE

## Your Lifetime Financial Partner

Orion Edge Solutions Limited is a premier financial advisory and wealth management firm committed to empowering individuals, families, professionals, entrepreneurs, institutions, and businesses to create, grow, protect, and successfully transfer wealth across generations. We recognize that every client's financial journey is unique. That is why we begin by understanding your goals, dreams, priorities, and life stage before recommending customized financial strategies aligned with your aspirations and risk profile. Our experienced financial advisors bring together extensive expertise in banking, investments, insurance, retirement planning, employee benefits, and estate planning to deliver objective, practical, and transparent advice. At Orion Edge, we believe financial planning is not a transaction—it is a lifelong partnership dedicated to helping our clients achieve lasting financial independence and peace of mind. Whether you are beginning your investment journey or managing an established portfolio, we are committed to helping you make confident financial decisions today while preparing for tomorrow.

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# VISION, MISSION & CORE VALUES



## VISION

To become East Africa's most trusted financial advisory and wealth management partner, empowering generations to achieve lasting financial freedom, prosperity, and security.

## MISSION

To help individuals, families, and businesses build, protect, preserve, and transfer wealth through trusted advice, innovative financial solutions, and exceptional client experiences.




## OUR CORE VALUES

**Integrity**

We uphold the highest ethical standards by acting honestly, transparently, and professionally in every engagement.

**Trust**

We build enduring relationships founded on reliability, accountability, confidentiality, and consistency.

**Excellence**

We strive for excellence in every recommendation, every interaction, and every solution we deliver.

**Customer First**

Every financial solution begins with understanding our clients' dreams, priorities, and aspirations.

**Innovation**

We embrace innovative financial solutions and modern technologies to deliver smarter, more effective outcomes.

**Growth**

We embrace innovative financial solutions and modern technologies to deliver smarter, more effective outcomes.

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# WHY CHOOSE ORION EDGE?

## Trusted Financial Advisors

Our experienced advisors provide objective, ethical, and professional financial guidance tailored to your unique needs.

## Personalised Financial Planning

Every recommendation is carefully designed around your goals, lifestyle, family needs, and future ambitions.

## Comprehensive Wealth Solutions

From wealth creation to retirement planning and estate preservation, we provide integrated financial solutions under one trusted partner.

## Long-Term Relationships

We remain committed throughout every stage of your financial journey, offering continuous advice and regular reviews as your needs evolve.

## Proven Financial Expertise

Our leadership team brings decades of combined experience across banking, wealth management, insurance, investments, pensions, and financial advisory, enabling us to deliver practical, sustainable, and results-driven solutions.







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# OUR SOLUTIONS

## 1. WEALTH CREATION

### Grow Your Wealth with Purpose

Building wealth requires more than saving—it requires strategy, discipline, and expert guidance.Our wealth creation solutions help clients accumulate assets, maximise returns, and achieve long-term financial independence.



### Our Solutions

- Money Market Funds.
- Unit Trust Investments.
- Managed Investment Portfolios.
- Education Savings Plans.
- Goal-Based Investment Planning.
- Children's Investment Plans.
- Regular Savings Plans.
- Offshore Investment Solutions.
- Investment Advisory Services.

## IDEAL FOR

- Young Professionals
- Families
- Entrepreneurs & Business Owners
- Diaspora Investors
- High-Net Worth Individuals

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# 2. WEALTH PROTECTION

## Protect What Matters Most

Life is unpredictable. Our comprehensive protection solutions safeguard your income, health, family, and assets against unforeseen risks.

## Our Solutions

- **Individual Medical Insurance.**
- **Family Medical Cover.**
- **Group Medical Insurance.**
- **Life Insurance.**
- **Mortgage Protection.**
- **Income Protection.**
- **Disability Cover.**
- **Critical Illness Cover.**
- **Last Expense Cover.**
- **Children's Education Protection.**





# 3. RETIREMENT SOLUTIONS

## Retire with Confidence

A secure retirement begins with thoughtful planning today. Our retirement specialists help clients accumulate retirement wealth while optimizing available tax advantages and investment opportunities.



### Our Solutions

- **NSSF Tier 2.**
- **Individual Pension Plans.**
- **Corporate Pension Schemes.**
- **Executive Retirement Plans.**
- **Retirement Income Planning.**
- **Retirement Investment Reviews.**
- **Pension Transfer Advice.**
- **Annuity Solutions**

# 4. ESTATE PLANNING

## Protect Your Legacy

Building wealth is only one part of financial success. Preserving and transferring it effectively is equally important. We help families and business owners protect their legacy through comprehensive estate and succession planning.




### Our Solutions

- **Estate Planning Advisory.**
- **Trust Structures.**
- **Wealth Transfer Planning.**
- **Business Succession Planning.**
- **Family Wealth Governance.**
- **Legacy Planning.**
- **Beneficiary Reviews.**

# 5. BUSINESS SOLUTIONS

## Helping Businesses Protect Their Greatest Asset—People

Successful organisations invest in the financial wellbeing of their employees.Our corporate solutions help businesses attract, retain, motivate, and protect their workforce while strengthening organisational resilience.



### Our Solutions

- Group Medical Insurance.
- Group Life Insurance.
- Employee Benefits Consulting.
- Staff Pension Schemes.
- Key Person Insurance.
- Credit Life Insurance.
- Business Continuity Planning
- Financial Wellness Programmes.
- Executive Benefits.
- SME Financial Advisory.



# OUR FINANCIAL PLANNING PROCESS

## A Clear Roadmap to Financial Success

1

### Step 1 – Discover

We take time to understand your financial goals, aspirations, priorities, and current financial position.

2

### Step 2 – Analyse

Our advisors evaluate your financial needs, identify opportunities, and assess potential risks.

3

### Step 3 – Recommend

We develop a personalised financial strategy aligned with your objectives and risk profile.

4

### Step 4 – Implement

We assist you in putting your financial plan into action through carefully selected solutions.

5

### Step 5 – Review

As life changes, so should your financial plan. We conduct regular reviews to ensure you remain on track.








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# WHO WE SERVE

## We proudly serve:

- Individuals
- Families
- Young Professionals
- Entrepreneurs
- Business Owners
- SMEs
- Corporates
- NGOs
- SACCOs
- Churches & FBOs
- Schools & Institutions
- Doctors
- Lawyers
- Engineers
- Accountants
- Diaspora Clients
- High-Net-Worth Individuals



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# OUR STRATEGIC PARTNERS

Through strong partnerships with Kenya's leading financial institutions, we provide our clients with access to trusted, innovative, and competitive

***Britam, CIC Insurance Group, Old Mutual Kenya, Jubilee Insurance, Heritage Insurance, ICEA Lion Group, Sanlam Kenya, APA Insurance, ABSA, NCBA, DTB and Stanbic***

Britam
With you every step of the way

CIC GROUP

OLDMUTUAL KENYA

Jubilee INSURANCE

HERITAGE Insurance
Pillars of Strength and Character.

ICEA LION GROUP
INSURANCE • PENSIONS • INVESTMENTS • TRUSTS

Sanlam KENYA

absa

APA INSURANCE
GENERAL • LIFE • HEALTH

Stanbic Bank

DTB DIAMOND TRUST BANK

NCBA

NSSF
Growing You. For Good

# OUR PROMISE



At Orion Edge Solutions Limited, your financial goals become our mission.

We are committed to helping you make informed financial decisions, build sustainable wealth, protect your loved ones, prepare for retirement, and create a lasting legacy.

Every recommendation we make is guided by integrity, supported by professional expertise, and focused on delivering long-term

When you partner with Orion Edge, you gain more than a financial advisor—you gain a trusted partner dedicated to your lifetime financial success.

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# AT THE HEART



**Faith Kaithia**

Strategic Banking Expert | Financial Advisor | Business Growth Strategist

Faith Kaithia is a seasoned financial professional with over 20 years of experience in banking, financial services, business growth, and strategic advisory. She has held senior leadership roles including Head of Branches, Head of Consumer Banking, and Head of Gold Banking, bringing extensive expertise in financial strategy, commercial growth, MSME development, and customer-focused solutions.At Orion Edge Financial Advisory, Faith leverages her deep banking knowledge and business acumen to provide tailored financial planning, investment advisory, wealth creation, and business growth solutions. She is passionate about empowering individuals and organizations to make informed financial decisions, manage risks, and achieve sustainable financial success.Through a blend of strategic insight, practical experience, and a client-centered approach, Faith helps clients build financial confidence, unlock opportunities, and create lasting value.



**Diana K. Muthamia**

Executive Financial Advisor

Diana is an experienced Financial Planning and Insurance Specialist with over 15 years of expertise in financial advisory, insurance solutions, wealth protection, retirement planning, and investment guidance.She is passionate about helping individuals, families, and businesses make informed financial decisions that protect their assets, build sustainable wealth, and achieve long-term financial security. With a Bachelor of Commerce (BCom), Diploma in Marketing Management, and Certificate of Proficiency (COP) in Insurance, Diana combines strong technical knowledge with practical industry experience.Having worked with leading institutions including Old Mutual Kenya, Britam, Standard Chartered Bank, and JKUAT, she brings deep expertise in risk management, retirement solutions, investment planning, and client relationship management.At Orion Edge Financial Advisory, Diana provides personalized financial strategies that empower clients to protect, grow, and preserve their wealth with confidence.

# LET'S BUILD YOUR FINANCIAL FUTURE TOGETHER

**Whether you are taking your first investment step, protecting your family, planning for retirement, growing your business, or preserving your legacy, Orion Edge Solutions Limited is ready to walk the journey with you.**

**Book Your Complimentary Financial Consultation Today**

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**Let's Build Wealth. Protect Dreams. Secure Legacies.**