

Our Company Profile



Baron Group was established in 2001 with a goal to:

“Help our clients achieve financial security and independence.”

Solutions for Businesses and Organizations

We offer the following investment and insurance services for businesses and organizations:

- **Saving and Investment Education Program** to secure the financial future of your employees
- **Provident Fund Set-up and Management** to ease the burden of managing your company provident fund
- **Mutual Funds** and **Pension Plans** for investment of company or employee funds
- **Group Health** and/or **Personal Accident Insurance** to protect the physical well-being of your employees.
- **Property Insurance, Liability Insurance and Surety Bonds** to protect your business operations, inventory and assets
- **Professional Liability Insurance** for professionals and directors
- **Group Life Insurance** coverage for your employees
- **Key man Insurance** to protect the company from the loss of key employees
- **Buy-Sell Agreements** to protect partners or shareholders of corporations from the loss of other partners and shareholders
- **Travel Insurance** when your employees travel on company business

Solutions for Individuals and Families

We offer the following investment and insurance services for individuals and families:

- **Financial Planning and Monitoring** to help you secure your financial future
- **Mutual Funds** and **Pension Plans** to invest your hard earned money
- **Education Plans** for your children’s future.
- **Health** and/or **Personal Accident Insurance** for children, adults and senior citizens. Both local and international coverage are available
- **General Insurance** coverage to protect your car, house and other personal assets
- **Life and Mortgage Redemption (MRI) Insurance** to protect your family if something happens to you
- **Travel Insurance** for a worry-free trip.

Our Products and Services

Financial Planning

An end-to-end Financial Planning program to teach novice investors how to save and invest for the retirement.

- Savings and Investment Seminars – 1 hour seminars on how to save and invest targeted at novice investors.
- One-on-one interview and Financial Plan – a personal and confidential interview followed by a 10-12 page financial plan.
- Quarterly Follow-up – quarterly check to see if the action plan is being followed.
- Annual Financial Review – a new interview and updated financial plan.
- Interactive Saving and Investment Activities – activities to keep investors motivated to save and invest. For example, Cashflow Gameboard 101 and 202.
- Weekly Newsletter – to keep investors motivated to save and invest.

Mutual Funds

A long-term investment that combines the money of investors into a fund. Funds are mainly invested in stocks and bonds.

Funds that we represent:

- DWS Deutsche Philippine Equity Fund
- Philippine Equity Fund – ING Bank
- Philippine Stock Index Fund – BPI
- Asia Pacific High Dividend Equity Fund – ING Bank (US Dollar)
- High Conviction Equity Fund – ING Bank
- Philam Strategic Growth Fund
- GSIS Mutual Fund - Philam
- Diversified Balanced Fund – ING Bank
- Philam Fund
- Optima Balanced Fund – Deutsche Bank
- Prudentiallife Fixed Income Fund – Deutsche Bank
- Dollar Bond Fund – ING Bank
- Euro Bond Fund – BPI (Euro)
- Philam Bond Fund
- AIG Global Bond Fund (US Dollar)
- Philam Dollar Bond Fund (US Dollar)
- Philam Managed Income Fund

Health Insurance

Insurance to protect you when you get sick. Benefits include (but not limited to) doctor and specialist visits, hospitalization, prescription, dental and emergency benefits.

Our Partners in Health Insurance

- Asian Life and General Assurance Corp.
- Blue Cross Insurance Inc.
- Cocolife Health Care
- Fortune Medicare, Inc.
- Health Maintenance Inc.
- Globalhealth Asia (Philam Insurance)
- Insular Life Health Care, Inc.
- Intellicare (Pryce Care)
- International SOS
- Maxicare Healthcare Corp.
- Medical Services Marketing & Development Corp.
- Medicaid Philippines, Inc.
- Medocare Health Systems, Inc.
- Philam Care Health Systems, Inc.
- Value Care Health Systems, Inc.

General (Non-Life) Insurance

Insurance to protect your personal and business assets against almost any risk.

- Motor Car Insurance
- Cargo Insurance
- Hull Insurance
- Fire (Property) Insurance
- Personal Accident and Travel Insurance
- Surety Bonds
- Electronic Equipment (EEI) Insurance and Contractor's All Risk (CAR) Insurance
- Liability Insurance – Personal, Product, Professional and Comprehensive General Liability (CGL)

Our Partners in General Insurance

- Alpha Insurance and Surety Co., Inc.
- Asia Insurance (Philippines) Corp.
- BF General Insurance Company, Inc.
- CCC Insurance Corp.
- Federal Phoenix Assurance Co., Inc.
- FLT Prime Insurance Corp.
- Generali Pilipinas Insurance Co., Inc.
- Liberty Insurance Corp.
- Malayan Insurance Co., Inc.
- Mapfre Insular Insurance Corp.
- Meridian Assurance Corp.
- Oriental Assurance Corp.
- Paramount Life and General Insurance Corp.
- Philam Insurance Company, Inc.
- Philippine Charter Insurance Corp.
- Philippine Fire and Marine Insurance Corp.
- Philippine First Insurance Co., Inc.
- Pioneer Insurance & Surety Corp.
- Plaridel Surety and Insurance Co.
- Seaboard-Eastern Insurance Co., Inc.
- Standard Insurance Co., Inc.
- Stronghold Insurance Co., Inc.
- The Premier Insurance & Surety Corp.
- Value Gen Financial Insurance Co., Inc.
- Western Guaranty Corp.

Life Insurance, Pension and Education Plans

Insurance to protect your family from untimely death. Investment plans for your retirement and the future educational needs of your children.

Our Partners in Life Insurance, Pension and Education Plans

- Asian Life and General Assurance Corp.
- Banclife Insurance Company, Inc.
- Generali Pilipinas Life Assurance Co., Inc.
- Great Pacific Life Assurance Corp.
- The Philippine American Life and General Insurance Co.
- Pioneer Life Inc.

Why you should deal with us?

We are Registered Financial Consultants (RFC)

We are members of the International Association of Registered Financial Consultants (IARFC) and we adhere to its mission that financial professionals are dedicated to helping people do a better job of spending, saving, investing, insuring, and planning.

We are independent. We work for you

We are not owned by, any bank, insurance company or financial institution, so our clients are our number one priority!

We will get you the best deal

Because of the different number of suppliers we deal with and our large client base, becoming our client doesn't mean added cost. It actually means a lower cost.

Excellent Customer Service

All your requests don't need to be followed-up from time to time. Once you've made the call to us, it becomes our responsibility to see to it that everything will run smoothly.