



Introduction for Kavita Bothra – Guest Speaker.

Ms. Kavita Bothra, is a seasoned Financial Coach, entrepreneur, and one of the most respected advisors in the insurance and wealth solution space.

Kavita brings with her an inspiring journey of over 23 years in the financial services industry, during which she has successfully guided hundreds of clients—many of them high-net-worth individuals (HNIs)—towards long-term financial security through goal-based planning, behavioral finance, and smart asset allocation.

She is a 4-time TOT (Top of the Table) qualifier, and a 2-time MDRT achiever—global accolades reserved for the top 1% of insurance professionals worldwide.

What makes Kavita uniquely positioned to speak on today’s topic—“HNI Prospects: How to Identify Prospects for Big-Ticket Sales”—is her deep understanding of how relationships and trust drive big-ticket business. Over the years, she has developed proven strategies to identify, nurture, and convert HNI leads through refined prospecting techniques and her personal pipeline of circles of influence.

She specializes in working with HNIs for Business Insurance, Succession Planning, and Married Women Property Act (MWPA)—all areas where thoughtful planning meets high-value execution. Her approach blends professional insight with a deep human understanding—qualities that have made her an expert at converting high-value opportunities into long-term relationships.

Kavita is also the founding partner of Primassure LLP, an investor-first financial advisory firm built on the pillars of transparency, client education, and empowerment. She leads an all-women team, with a personal mission to drive financial independence for women, and is passionate about mentoring young advisors on ethical selling and sustainable growth. Recently, her daughter has also joined the business paving the way for a smooth succession plan.

Her ability to convert potential into high-value business makes her a true authority on today’s topic.

Now, before we dive in—

Have you ever wondered how to break into the elusive HNI segment?

What really gets an HNI to trust you with a high-value policy?

and more importantly, how do you build a sustainable pipeline of HNI prospects?

Well, today Kavita will not only answer these questions but also share a examples of how she cracked a big-ticket sale with her unique strategy.

Let's welcome Ms. Kavita Bothra to take us through her insights on "HNI Prospects – How to Identify Prospects for Big-Ticket Sales."

Please join me in welcoming Ms. Kavita Bothra to the stage