CORPORATE BROCHURE

INDIA | **WEALTHAPP**

DISTRIBUTORS PVT LTD

2023

EDITION

Bengaluru | Delhi NCR | Hyderabad | Kolkata | Mumbai | Prayagraj

FOCUS|FORTITUDE|FINESSE

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ABOUT US

WealthApp Distributors was set up in 2014, by a team of experienced bankers with a vision to provide Unbiased Process Driven Financial Planning Services and with one primary focus - to help our clients simplify their financial needs.

WealthApp clients can see their entire portfolio across Banks, Insurance Companies, Post Offices and Mutual Funds, 'All in One page / App'. We provide customised solutions, with end-to-end offerings for all your financial needs.

Bengaluru | Delhi NCR | Hyderabad | Kolkata | Mumbai | Prayagraj

PLAN FIRST

PRODUCT LAST

CLIENTS UNDER MANAGEMENT

500+
Indian Families

200+
NRI Families

1000+
Portfolios

OUR TOP ADVANTAGES

Global Network

Customized App

Certified Financial Planners

NRI Cell

Proven Track Record

One-Stop Shop

From investment services, insurance, tax planning, portfolio management and corporate advisory to family, estate & trust planning and NRI services, we are your One-Stop Shop.

24/7 Support

Our dedicated support team is at your service 24/7 instantly for anything, anytime.

Knowledge Bank

With a group of leading Industry Experts with profound knowledge we give you access to best-in-class products and services.

OUR 6 STEP FINANCIAL PLANNING PROCESS

PROPOSITIONS

- Certified Financial Planners
- Commitment
- Integrity
- Sound Advice

SERVICES

Wealth Management

Estate and Trust Planning

Tax Planning

Dedicated NRI Cell

Portfolio Management Services

SERVICES

Wealth Management

Properly managing your investments is critical to working toward your financial goals but that's not enough. You need a plan that guides your investment and financial decisions. But even having a plan is not enough. You need to take action. And because your life is always changing, your plans and actions need to adapt to changes. As your wealth grows or when you face certain financial situations such as retirement, reducing debt, determining the types of insurance needed, or buying or selling a business, the planning process can be complicated and time-consuming. That's where we shine.

Estate & Trust Planning

Estate is all the property that you own. It can include cash, property, income from property, deposits, jewellery, retirement proceeds, investment and savings accounts etc. Estate planning is essential for all, regardless of one's economic standing. Estate planning involves making plans for the transfer of your estate to your legal heirs in the event of death or disability.

Tax Planning

WealthApp offers you prudent advice on how to efficiently optimize your taxes. We will suggest relevant tax-saving ideas and instrument options that will effectively address the four important issues regarding tax-planning:

- Is there any tax benefit on the amount invested?
- Is there any tax benefit on the income received from such investments?
- Is the principal investment received on maturity taxable?
- What is the rate of tax on the income received?

SERVICES

Dedicated NRI Cell

Administrative and Financial Assistance :
PAN Application, PIS Approvals, Account opening (bank & investment custody)

One-Point Contact :
Representation, negotiation and facilitation of transactions.

Network of FEMA & Immigration Experts :
Obtaining advice and connecting you to FEMA experts for compliance of regulations

Bank & Custody Account Management :
Operation of bank & investment accounts.

Assistance with Tax Returns :
Appointment of Chartered Accountants, assistance with tax-related documents, filing of tax returns & refunds.

Portfolio Management Services

We offer investment management and advisory services to individuals who not only understand the long-term potential of equities as an asset class, but also understand the associated risks. We also have an access to a number of Third Party PMS by various Fund Houses and NBFCs with research desk that actively researches and tracks their performance.

PRODUCTS

Alternative Investment Funds	Alternate Investment Funds (AIF's) are investments primarily made by HNI's or institutional investors into asset classes other than stocks, bonds and cash. AIF's usually include real estate, private equity, hedge funds and venture capital funds or investments.
Bonds	A bond is a fixed income instrument that represents a loan made by an investor to a borrower (typically corporate or governmental). Bonds are used by companies, municipalities, states, and sovereign governments to finance projects and operations. Owners of bonds are debt holders, or creditors, of the issuer.
Mutual Fund	A mutual fund is nothing more than a collection of stocks and/or bonds. Income is earned from dividends on stocks and interest on bonds. If fund holdings increase in price but are not sold by the fund manager, the fund's shares increase in price. You can then sell your mutual fund shares for a profit.

PRODUCTS

Real Estate

Real Estate in India is growing at a phenomenal pace. Therefore it is imperative that individuals focus on Real Estate as a preferred avenue of Investments and Wealth Creation. Buying or Selling property is a complex process. You need someone qualified who understands the market, the neighborhood and its people. We act as a facilitator, helping you save time and energy and provide the best available units available in the market. We facilitate the transactions. After telling us your requirements, you can rest back as we take care of the rest, right from scanning, selecting properties, negotiating terms and conditions till the deal is finalized.

Structured Products

Structured Products are designed to meet unique risk-return objectives. These objectives are achieved by taking conventional underlying assets and replacing their usual returns with non-traditional payoffs from other underlying assets.

Insurance

Insurance is a means of protection from financial loss. It is a form of risk management, primarily used to hedge against the risk of a contingent or uncertain loss. The various forms of insurance are Life, Health and General Insurance.

KEY PEOPLE

Soumyajit Ghosh

Founder Director

Soumyajit is responsible for the product strategy of Wealthapp and manages the financial planning process. He is a postgraduate in finance and CFP with 28 years of experience in Wealth management

Neeladri Misra

Executive Director

Neeladri is responsible for expansion through strategic initiatives national and international, real estate advisory and also functions as the CTO. He is a post graduate with 3 decades of experience in Banking, Insurance and Fintech.

Anindya Paulchaudhuri

CEO

Anindya drives the financial planning team and is the business head of the organisation. He leads the Family Office vertical. Anindya brings in 25 years of banking and wealth management experience

Jaydeep Pratap

COO and Head of North Business

Jaydeep is the Chief Operating Officer and also drives the North India business for the company. He is a Chartered Accountant with more that 20 years experience in Banking and Fintech.

KEY PEOPLE

Abhishhek Mehrotra

Director

Abhishhek is the Regional Director of South India, has 20 years of Wealth Management experience. He is an MBA in Marketing & Finance.

Debankur Sengupta

Director

Debankur brings in 20 years of Wealth management experience having worked across banks/geographies. He is a post graduate in management and CFP.

Mapreet Sandhu

Director

Manpreet brings in 20 years of banking experience and manages our key South India relationships. She works closely with Neeladri in the International proposition.

Payal Chatram

Director

Payal manages our Bengaluru market. She brings in more than 15 years of banking experience.

Mohammad Tahir

Vice President

Tahir brings in 20 years of banking experience and manages certain micro markets of UP like Allahabad and Varanasi. He is an MBA from Lucknow University.

Amit Sinha

Sr. Vice President

Amit leads the West India business for Wealthapp. He is a post graduate in management with almost 20 years of experience in Wealth Management.

EVENTS

Barge Party with Clients

Jungle Carnival at ITC Tribeni

Session at The LaLiT Great Eastern

Financial Planning at Bata India Ltd

Team get together at The Bengal Club

EVENTS

Kolkata Literary Meet 2022

Bengal Business Council
at Biswa Bangla Convention Centre

Session at Calcutta Club

EVENTS

Financial Planning Session at ITC Tribeni

Session with Helios Capital at Bengal Club

Team Picnic & Property Visit with Clients

Panel Discussions across Bengaluru, Hyderabad & Gurugram

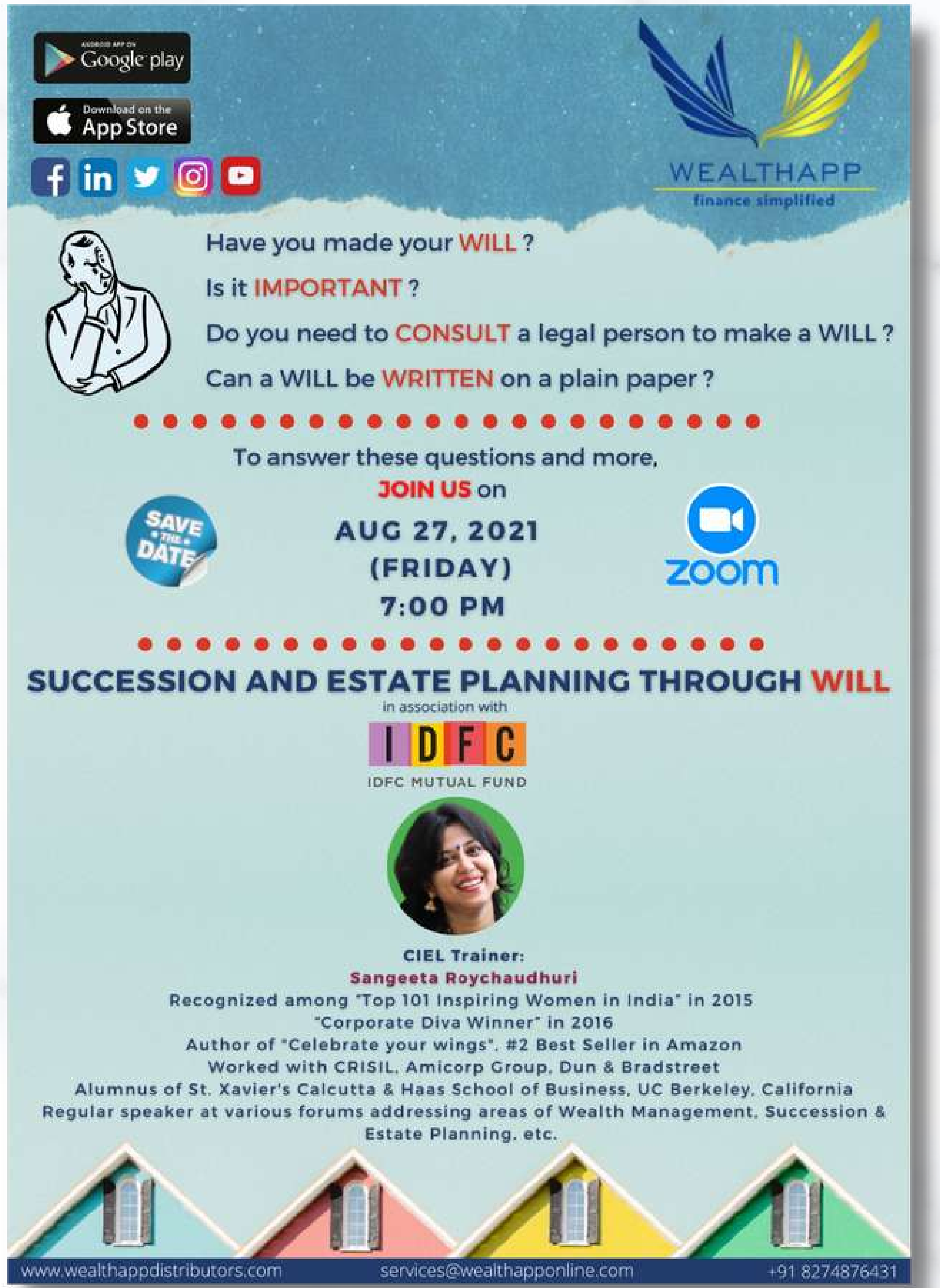
Exclusive sessions for our clients

WEBINARS

Prevention of Cancer

Succession and Estate Planning through WILL

Parenting in the Covid Era



CLIENT TESTIMONIALS

We have taken WealthApp's retirement planning solution in the year 2016. It gives me great pleasure to say that we have benefited immensely from the in-depth analysis and solutions provided by WealthApp. What we found very beneficial was their personalised approach wherein they have provided us with customised solutions to our varied requirements from time to time. WealthApp Team has also been proactive in providing us with financial prudence in the field of fund management. In the market scenario today, it gives us the confidence that they are our right financial partners. WealthApp has also provided us with detailed market trends and analysis, with an overview of macro and micro analysis of socio-economic factors on a national and global scale. This in turn has helped WealthApp to jointly walk hand in hand with us in today's volatile market scenario. I congratulate WealthApp on opening of its offices at Hyderabad and Bengaluru and wish them all the best in their journey towards prosperity.

- Amitava Sengupta

SIEMENS

Over the past 20 years, I know Soumyajit and am investing with Wealthapp Distributors since the very beginning. I really love the transparency with which Team WealthApp provides me all the details regarding my investments.

- ADITYA MODI

INDUSTRIALIST, GURGAON

Our experience with WEALTHAPP has been SUPERB till date. Soumyajit has been PERSONALLY extremely USEFUL as well as CARING in GUIDING and GROOMING us towards the advantages of being invested with MUTUAL FUNDS (MFs).

Your BACKEND SUPPORT including Ms. JAYATEE has been SUPERLATIVELY RESPONSIVE in terms of providing answers to our various queries along with NETWORKING with VARIOUS MFs has been great as well as hassle free.

The BEST USP which WEALTHAPP has is its ONLINE PORTAL which not only gives the DAILY UPDATE on the PRESENT VALUE of our INVESTMENTS which is VERY COMFORTING but also further gives a DETAILED ANALYSIS of OUR INVESTED PORTFOLIO.

Last but NOT the LEAST, WEALTHAPP I FEEL has developed its SOUND CREDIBILITY over the YEARS, which it WELL DESERVES and WE the ROYS WISH THEM ALL the BEST & NTH GROWTH for their FUTURE.

- Sudip Roy (Retired), Mumbai

TATA MOTORS FINANCE LIMITED

CLIENT TESTIMONIALS

I retired last year in July and got in touch with Mr. Soumyajit of Wealthapp Distributors. He met me, and that was the last day for the stress of Financial planning for my Retiral benefits. My corpus has been appropriately invested and I am getting returns that has been planned. Their homework and analysis is in-depth and customer-centric. I am fully satisfied with their professional expertise. Thanks, Wealthapp Distributors Team for being a wonderful support.

-Deepak Srivastava (Retired), Chennai

Nestlé

My observations:

1. My association with Wealthapp Distributors is since its birth and my experience has been very engaging and refreshing.

2. Wealthapp Distributors stands out for its competence and my best wishes remain.

- Kalyan Dhall

DeeceeElectrosystems Private Limited, Kolkata

I would advise everyone to open up your mutual fund account today because you have the best person sitting here, who could guide you.

- **MR. SAURABH MUNDRA**, PROPRIETOR

PRINT O GRAPHICS

I really liked his prompt services and very happy to invest through him. I hereby ask all of you to get at least one mutual fund from him and get those fantastic advice and support.

- Mr. Raj Kumar Verma

Abatech Solutions Pvt. Ltd.

CONTACT US

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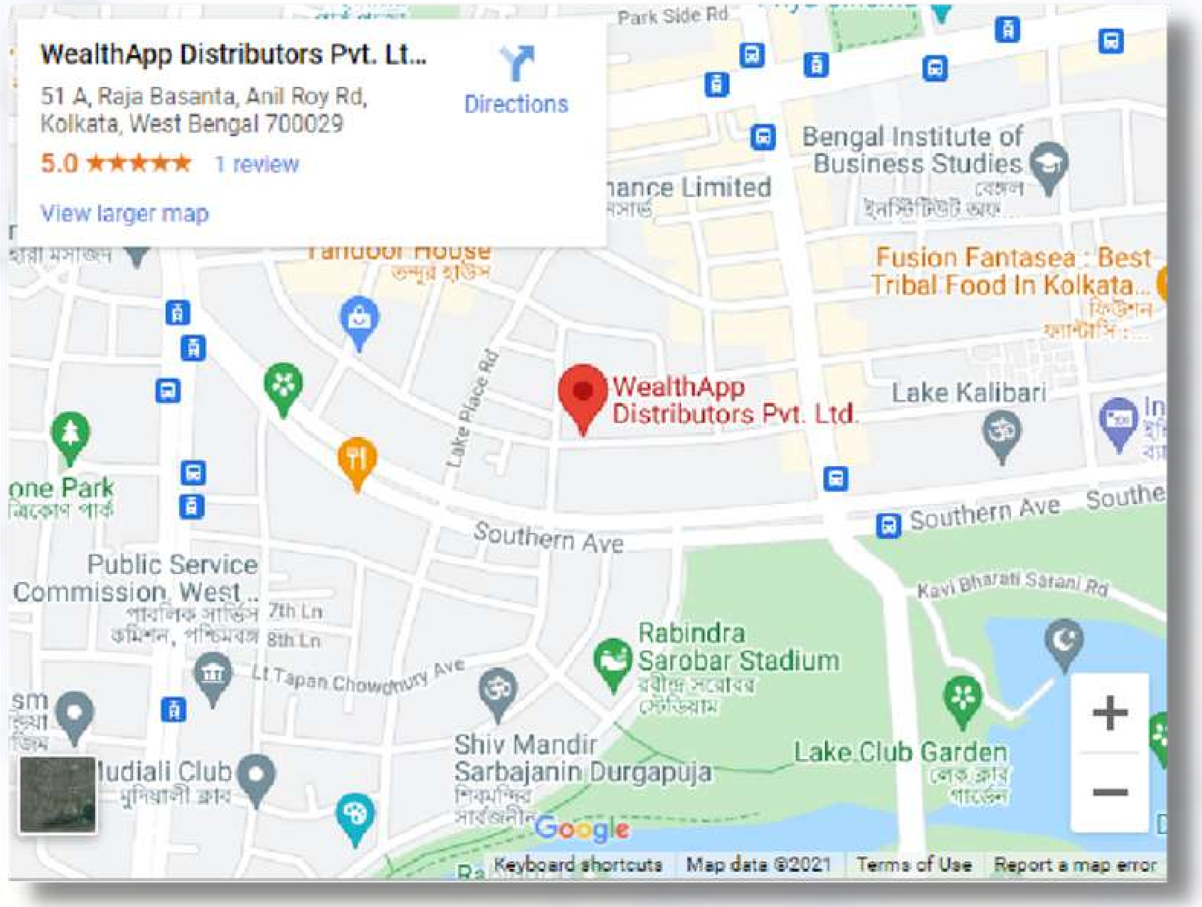

To know more about our services

You may hear our Founder Director speak


WEALTHAPP
finance simplified
When 'I' is replaced by 'we'
even 'illness' becomes 'wellness'.

WEALTHAPP

finance simplified