



WEALTHAPP  
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## WELL THEE

Newsletter | Apr' 24



### Message from Team WEALTHAPP

## WEALTHAPP turns 10

Welcome to the April 2024 edition of WellThee.

We take great pleasure in honouring our clients and their remarkable stories through WellThee, our monthly e-magazine.

**Please share your stories of success, events and community work that you wish to be published.**

Email : [services@wealthapponline.com](mailto:services@wealthapponline.com)

WhatsApp : [+91 8100713678](tel:+918100713678)

### “QUOTE OF THE MONTH”

PLANNING IS BRINGING THE FUTURE INTO THE PRESENT  
SO THAT YOU CAN DO SOMETHING ABOUT IT NOW.

- ALAN LAKEIN



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### Newsletter | Apr'24



#### CLIENTS' STORIES

Our client Dr. Anit Nath Mukherjee served as a member of the United Nations Working Group on the Digital Public Infrastructure Universal Safeguards. You can read more about it in the following website:

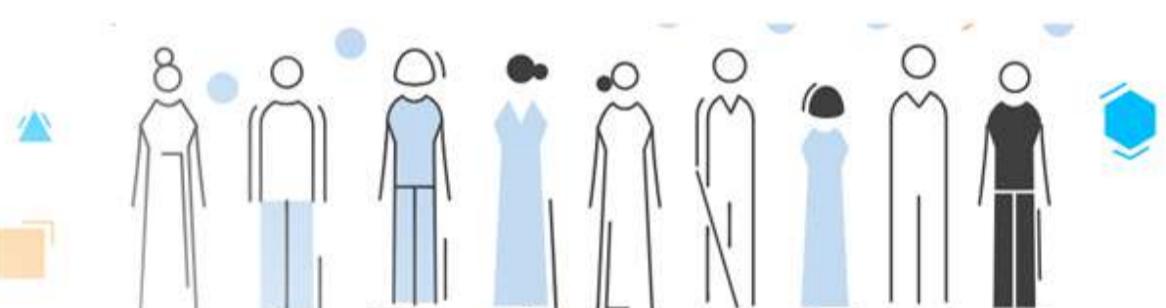
<https://www.dpi-safeguards.org/>

Following are the client stories for this month.

#### Dr. Anit Nath Mukherjee



#### WORKING GROUP MEMBERS



The expertise within the DPI Safeguards' working groups ranges from artificial intelligence (AI) to cybersecurity and open-source technologies. The members are brought together by a common focus on ensuring safety and bridging the digital divide. They are also motivated by the belief that safe and inclusive DPI can enable societies to achieve the Sustainable Development Goals (SDGs).

There is also an International Organizations Consultative Group, focused on enriching the working groups' endeavors with insights from diverse international contexts. Their efforts seek to ensure that the DPI Safeguards Framework is both globally relevant and locally applicable. This consultative group comprises representatives from the Asian Development Bank (ADB), African Development Bank (AfDB), European Bank for Reconstruction and Development (EBRD), Islamic Development Bank (IsDB), International Telecommunication Union (ITU), Organisation for Economic Co-operation and Development (OECD), Office of the United Nations High Commissioner for Human Rights (OHCHR), United Nations High Commissioner for Refugees (UNHCR), United Nations Children's Fund (UNICEF), United Nations University (UNU), Better Than Cash Alliance (UTN), and the World Bank.



André Xuereb  
Digital Affairs Ambassador of Malta



Angelina Fisher



Anir Chowdhury



Anit Mukherjee  
Senior Fellow at Observer Research Foundation America



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02 of 13



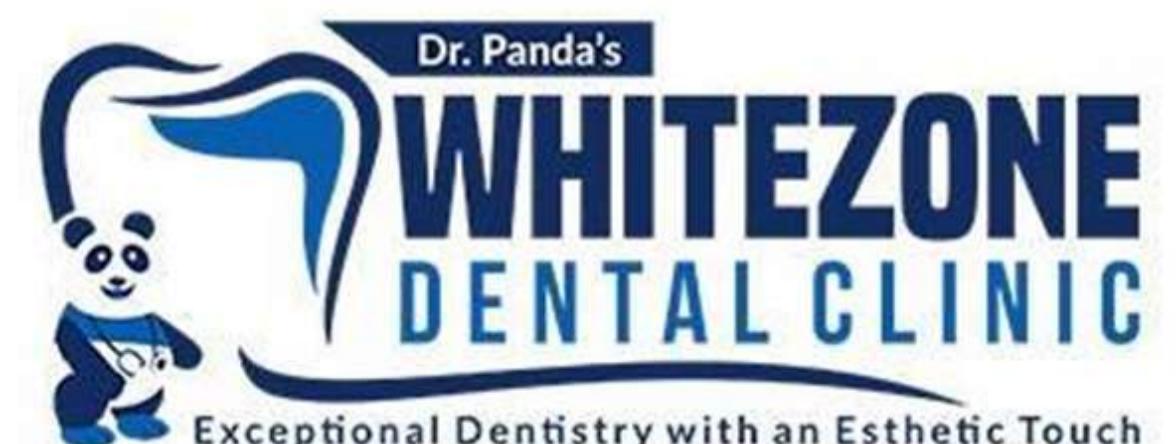
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### Newsletter | Apr'24



#### Dr. Krishnakali Chatterjee and Dr. Biswajit Panda

An awareness camp was organized by our client couple and dental surgeons, Dr. Biswajit Panda and Dr. Krishnakali Chatterjee at their White Zone Dental Clinic on International Women's Day in partnership with the Indian Dental Association (Kolkata City), Brave Soul Foundation and Rotary Club of Kolkata Hiland Park 3291. In the camp, women who had been victims of acid attack were felicitated. The event was covered by various media houses. You can watch the clips by clicking on the below videos.



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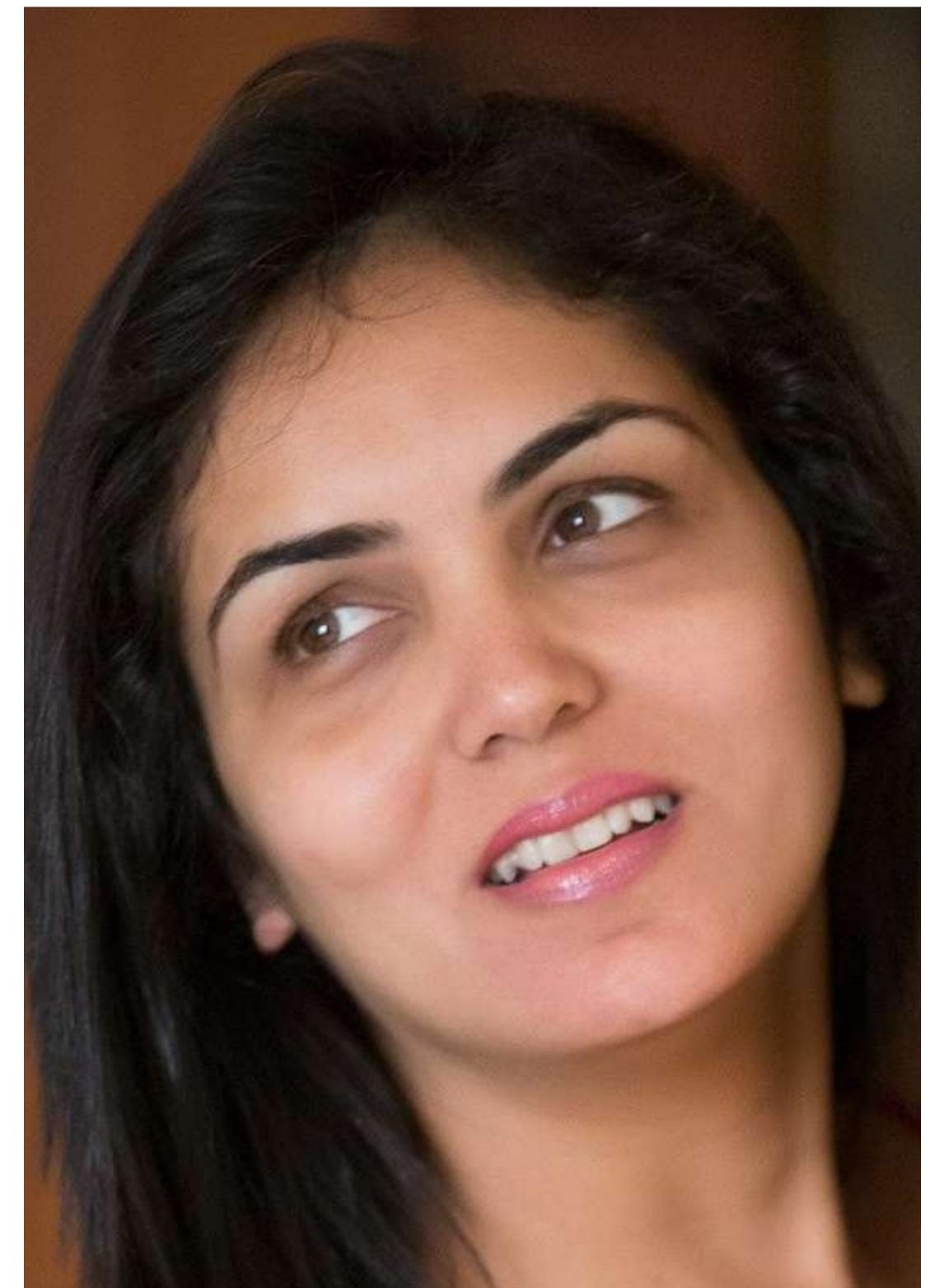
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Ms. Anisha Johri

Co-founder of Decorage & Associates, Ms. Anisha Johri, our client, featured in the Times of India, on 17th March, 2024 (Sunday). The article was about her women-led modular furniture designer firm.

Anisha Johri, co-founder of Decorage & Associates, is at the helm of an only women-led modular furniture designer firm and she gives importance to the policies that empower women. Johri said, "As male entrepreneurs are predominant in production units, setting up this factory and running it successfully has made us stand apart. We believe in breaking the stereotypes of office interiors. Moreover, the use of state-of-the-art machinery has also helped us provide the best services. Our business is thriving now as we are meeting the diverse needs of the clients."



As male entrepreneurs are predominant in production units, setting up this factory and running it successfully has made us stand apart. We believe in breaking the stereotypes of office interiors



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### Ms. Atri Bhattacharya and Ms. Mousumi Sengupta

Our clients Ms. Atri Bhattacharya and Ms. Mousumi Sengupta were present at the Damini Awards, 2024.



Atri Bhattacharya, Imran Zaki and Mousumi Ghosh handing over the award to Manoshi Roychowdhury.



Handing over the award to Deboshree Roy with the ace director Avijit Sen and the national award winner Sabarni Das.



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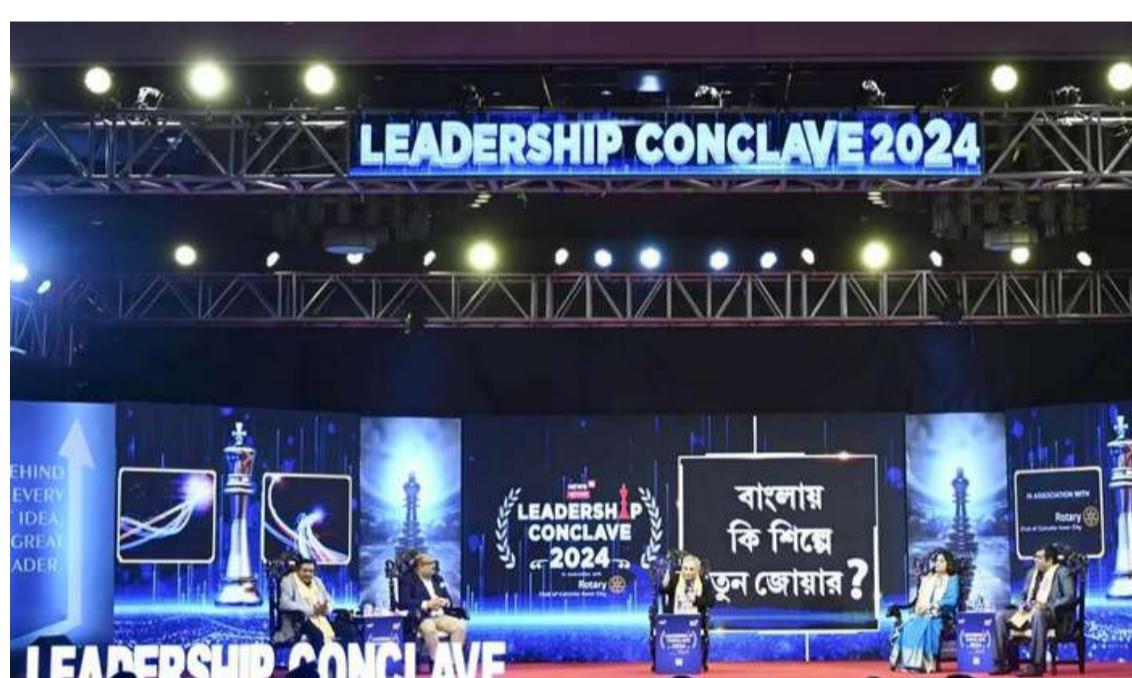


LIFE AT WEALTHAPP

### Leadership Conclave 2024

Mr. Anindya Paulchaudhuri, CEO - Wealthapp, served as one of the jurors for the prestigious Corporate Leadership Award. Additionally, he participated as a panelist in a discussion on corporate excellence. You can view the snippets by clicking on the below link.

<https://bit.ly/43xguoN>



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Google play

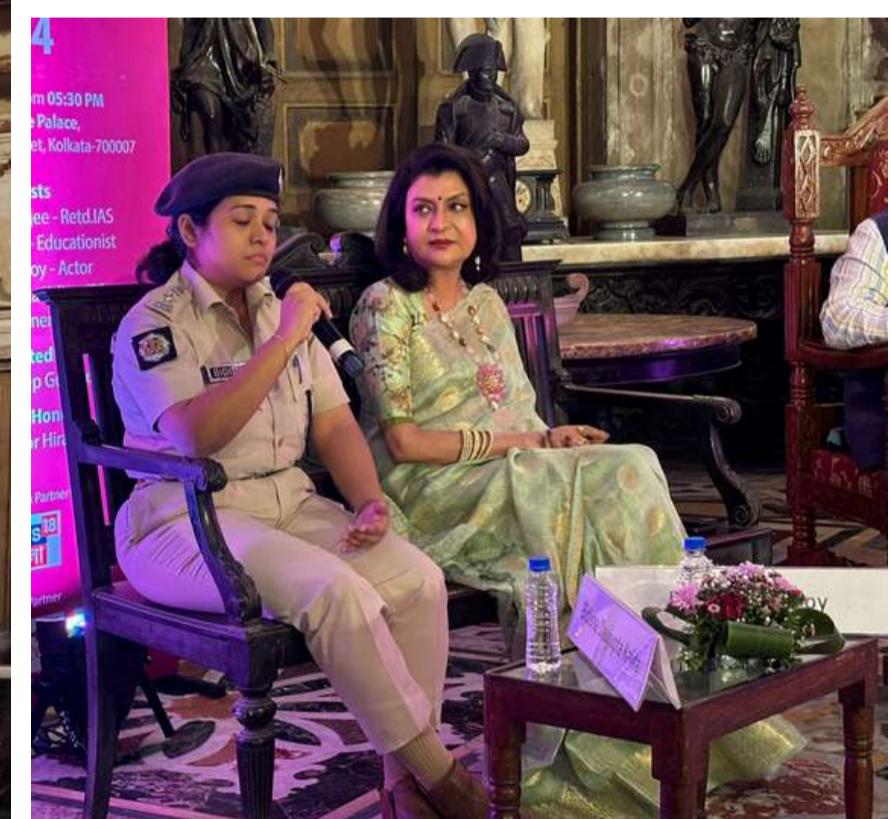
Download on the  
App Store



LIFE AT WEALTHAPP

Rotary Club

Later, last month he had the honour of serving as the master of ceremonies for the International Women's Day celebrations hosted by Rotary Club at the historic Marble Palace. Here he is pictured with two esteemed panelists: DC of Kolkata Police, Ms. Bidisha Kalita Dasgupta, IPS, and renowned actress Ms. Debashree Roy.



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Newsletter | Apr'24



Event at Varanasi

Team Wealthapp organized a discussion on India-2025 at Varanasi. The event was attended by people across all verticals.



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08 of 13



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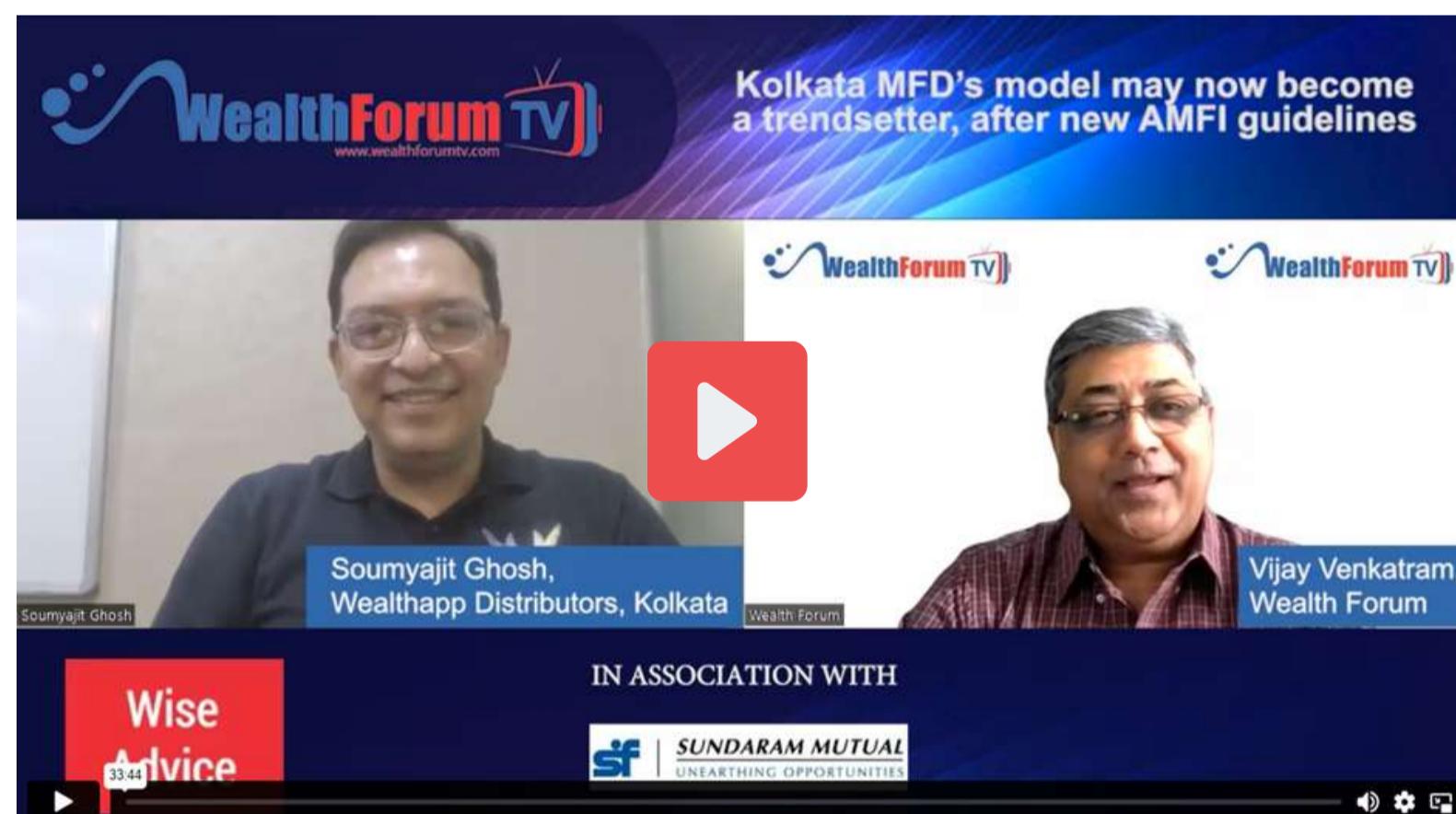
## Newsletter | Apr'24



LIFE AT WEALTHAPP

WealthForum TV

Listen to Mr. Soumyajit Ghosh speak on the following topics, by clicking on the below videos, at WealthForum TV, India's finest library for Financial Advisors:



Kolkata MFD's model may now become a trendsetter, after new AMFI guidelines.

18 responsibilities of an MFD - are you doing justice to these?

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09 of 13



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Newsletter | Apr'24



### PRESS COVERAGE

The Telegraph, Business : Monday, 29th January 2024

Click to read the full article : <https://bit.ly/3SDRkRm>

## Wealthapp AUM goal: Rs 2,500cr

### A STAFF REPORTER

Calcutta: Wealthapp, a wealth management company, has set its sight on expanding its assets under management to Rs 2,500 crore by 2025.

"Our current AUM is about Rs 950 crore and our target is to reach Rs 2,500 crore by 2025. We started with a small setup in Calcutta in 2014," Anindya Paulchaudhuri, partner and group CEO, Wealthapp, said.

"Now, we are present in seven cities with a 30-member team and serve around 1,500 families globally, including a substantial NRI clientele," he said.

"Our approach is to undertake financial planning for our client and offer goal-based solutions. We suggest those products that would suit the risk profile of the individual."

"When top executives from large Indian private sector corporations across the manufacturing and services sector retire, they are referred to us for wealth management," Paulchaudhuri, who held senior leadership roles in ABN AMRO, Standard Chartered and DBS Bank, said.

Wealthapp has diversified into family office business, broadening its services to include legacy, estate planning and tax advisory services.

Wealthapp was founded in 2014 by Soumyajit Ghosh, with an investment background at ANZ, ABN Amro and Citi-group.

"We are grateful for the trust and confidence our clients have placed in us over the past decade. As we look ahead, we remain dedicated to our core values of integrity, transparency and client satisfaction," Ghosh said.

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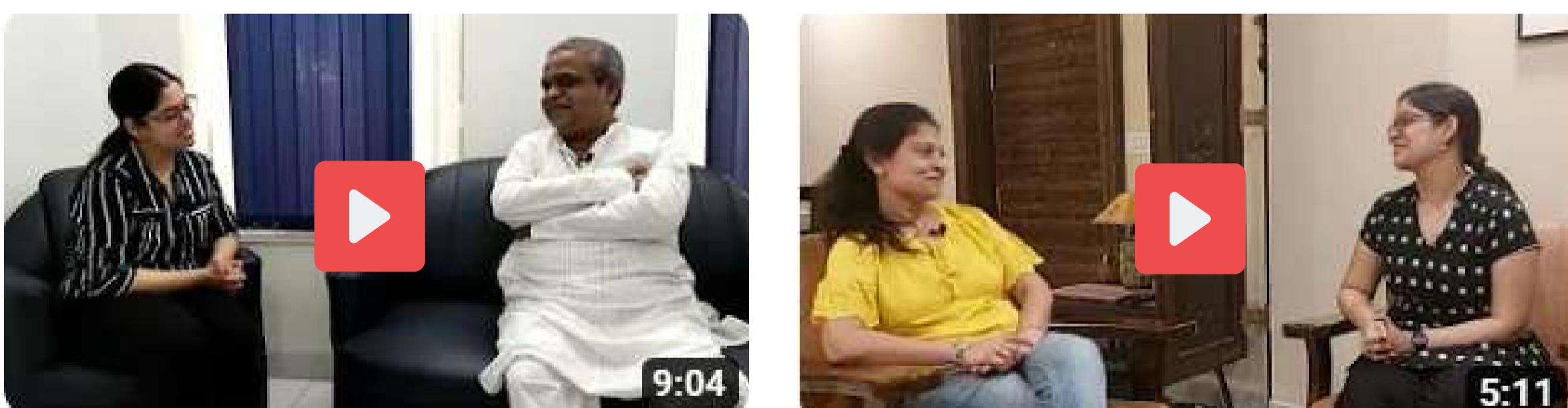


LIFE AT WEALTHAPP

### WEALTHAPP Holiday Adda

As WEALTHAPP stepped into the 10th year in 2024, we have launched our weekly WEALTHAPP er Adda on YouTube, to celebrate our clients and their stories. This month we are sharing the adda with our clients, MR. ARNAB MAJUMDAR, MS. DAMAYANTI CHAKRABORTY AND MR. VIVEK SHRIVASTAVA.

We will share more such interesting client stories every weekend.  
You can watch this month's Holiday Adda by clicking on the following videos.



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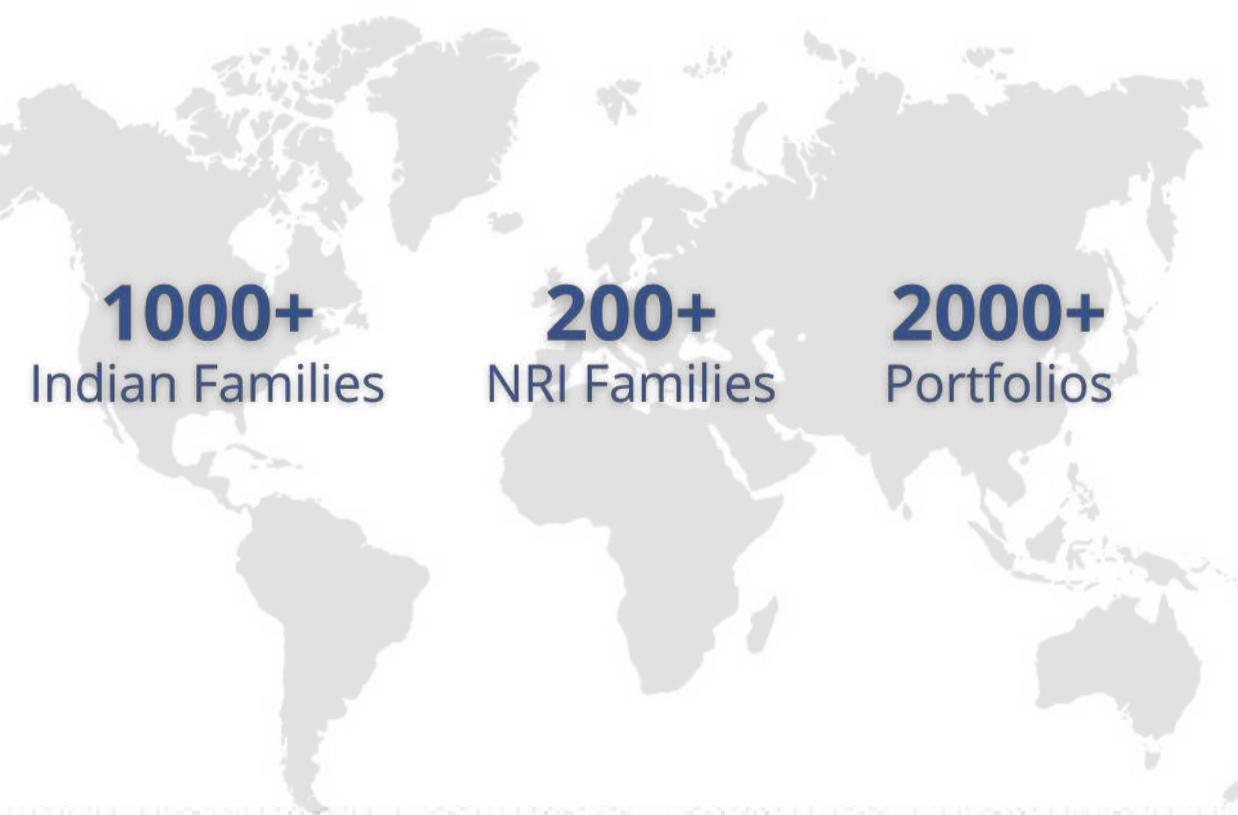
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*Presence in Bengaluru, Delhi NCR, Guwahati, Hyderabad, Mumbai, Kolkata and Prayagraj*



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