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Message from **WealthApp Team**

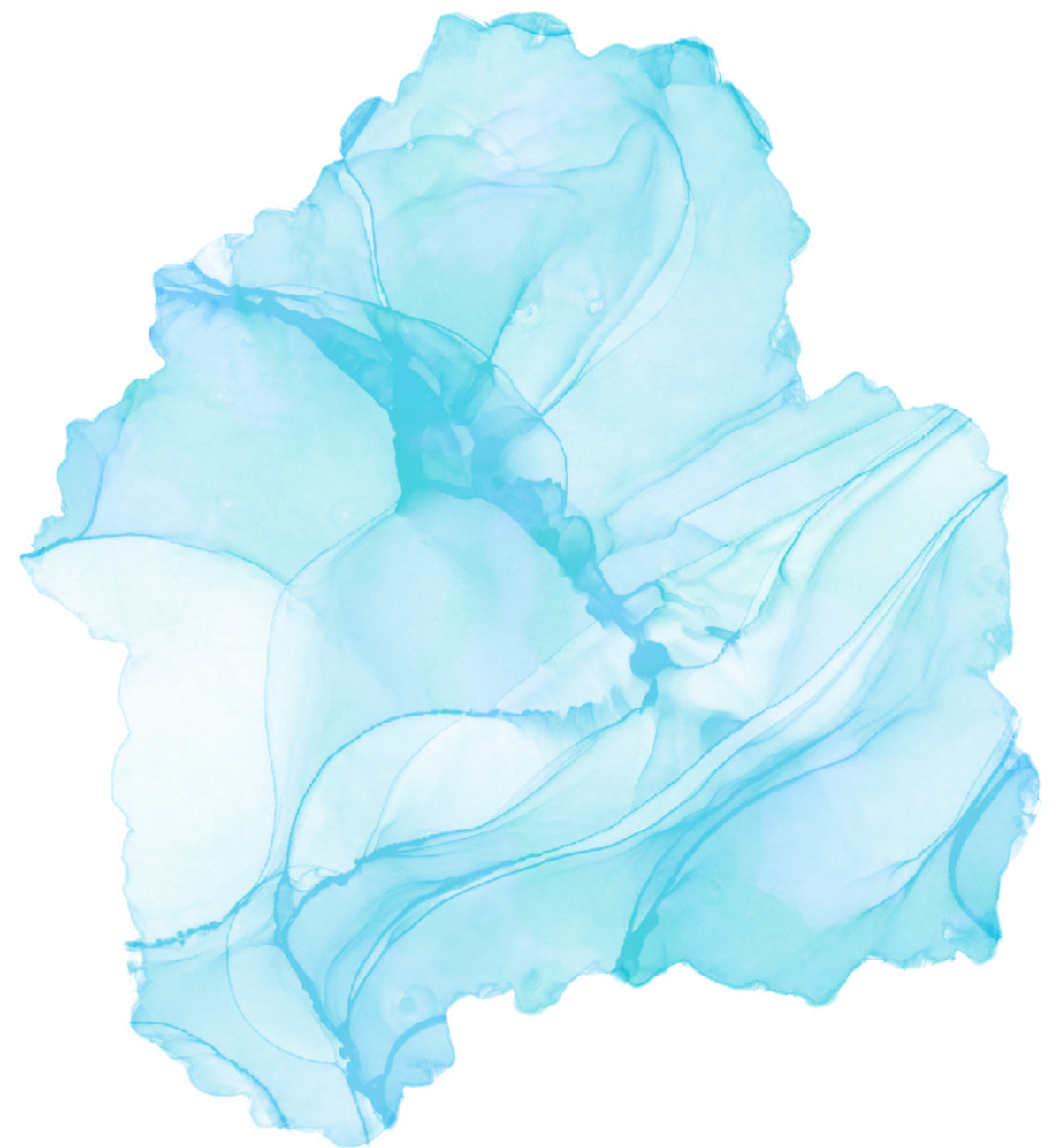
Welcome to the February 2023 edition of WellThee.

WellThee is for our clients and their stories.

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

Email : **services@wealthapponline.com**

WhatsApp : **+91 8100713678**



“QUOTE OF THE MONTH”

**MOST PEOPLE DON'T PLAN TO FAIL
THEY FAIL TO PLAN**

- JOHN L BECKLEY

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LIFE AT WEALTHAPP

Launch of WEALTHAPP FAMILY OFFICE



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Family Office

Wealthapp launched the Family Office Business on 23rd January, 2023.

Wealthapp was set up in 2014 by a team of professionals led by Soumyajit Ghosh. The chairman of the family business venture is Rahul Johri and Soumyajit Ghosh is the CIO and Chief Strategist. Anindya Paulchaudhuri is the MD and CEO while Arnab Mukherjee is the Director.

WHY A FAMILY OFFICE?

A family may wish to create a formal distinction between family wealth and the assets of the business. This will mean financial risk diversification, improve transparency and corporate governance of the family business. The Family Office will offer a comprehensive suite of services that will take care of every aspect of the family's financial requirement.

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Launch of WEALTHAPP FAMILY OFFICE

The launch was covered by The Telegraph.
<https://bit.ly/3Y4R4uw>

The Telegraph

Wealthapp plans family office

OUR SPECIAL CORRESPONDENT

Calcutta: A city-based wealth management firm is foraying into the heady realm of family office services at a time preservation and accumulation of legacy wealth appears to be a key concern among well-heeled families.

Led by a group of professionals with years of experience under the belt in the field of high finance, Wealthapp Distributors Pvt Ltd plans to offer the service of a family office to clients who do not wish to take up the hassle of setting up their own exclusive office just as yet.

Wealthapp, which has Rs 550-crore assets under management via a wealth management service, is going to offer bespoke investment advisory, tax and estate planning, inheritance and succession planning and philanthropy to its clients.

A new outfit has been set up by the company to engage in the business where earn-



Anindya Paulchaudhuri during the unveiling of the Wealthapp Family Office logo at the Calcutta Literary Meet

ing the trust of the client and maintaining it over the years is the name of the game. "We would like to be the personal *muminji* — the very trusted lieutenant who has nothing but *babu's* interest in mind. We will offer a comprehensive suite of services that will take care of every aspect of the family's financial requirement," said Anindya Paulchaudhuri, managing director and CEO of Wealthapp Family Office.

The new business was launched last week during Calcutta Literary Meet where

a seminar on Bengal and Business took place. To begin with, the company will look at a minimum corpus of Rs 10 crore to manage under the family office business.

The concept of family office traces its roots back to the days of the industrial revolution when many successful entrepreneurial families created informal structures to manage and support investments into new business ventures. Over the centuries, the structure evolved and became complex, and nuanced as it increasingly responded to the dynamics of tax and regulatory compliances across multiple jurisdictions.

Many top-notch Indian billionaires have set up family offices already and a large section of them are located outside India, notably in Singapore and West Asia.

Explaining the idea, Paulchaudhuri said that it is a private wealth management service offered to top-echelon net-worth investors to centralise, focus and have better control over family finances.

It is an outsourced solution to manage the financial and investment affairs of large families. It works to provide the best solution for building, preserving and transferring family wealth, he added.

"At Wealthapp we have a professional management team to help large families to set up their family office. A family may wish to create a formal distinction between family wealth and the assets of the business. This will mean financial risk diversification, improve transparency and corporate governance of the family business," he explained.

There are a few Mumbai-based financial services companies that offer family office services. Wealthapp is hopeful that their deep contact with city-based business families could get them a head start.

"We are already serving them as wealth managers. But family office service will be going a step further and expanding the horizon," Paulchaudhuri explained.



Home / Business / Calcutta-based wealth management firm
Wealthapp plans family office

Calcutta-based wealth management firm Wealthapp plans family office

The company is going to offer bespoke investment advisory, tax and estate planning, inheritance and succession planning and philanthropy to its client



Anindya Paulchaudhuri unveils the Wealthapp Family Office Logo at the Calcutta Literary Meet

Below are few glimpses of the star-studded launch.

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Launch of WEALTHAPP FAMILY OFFICE



Rahul Johri, Anindya Paulchaudhuri
& Soumyajit Ghosh (L to R)



With Javed Akhtar



With Divya Dutta



With Mallika Sarabhai & Mahua Moitra

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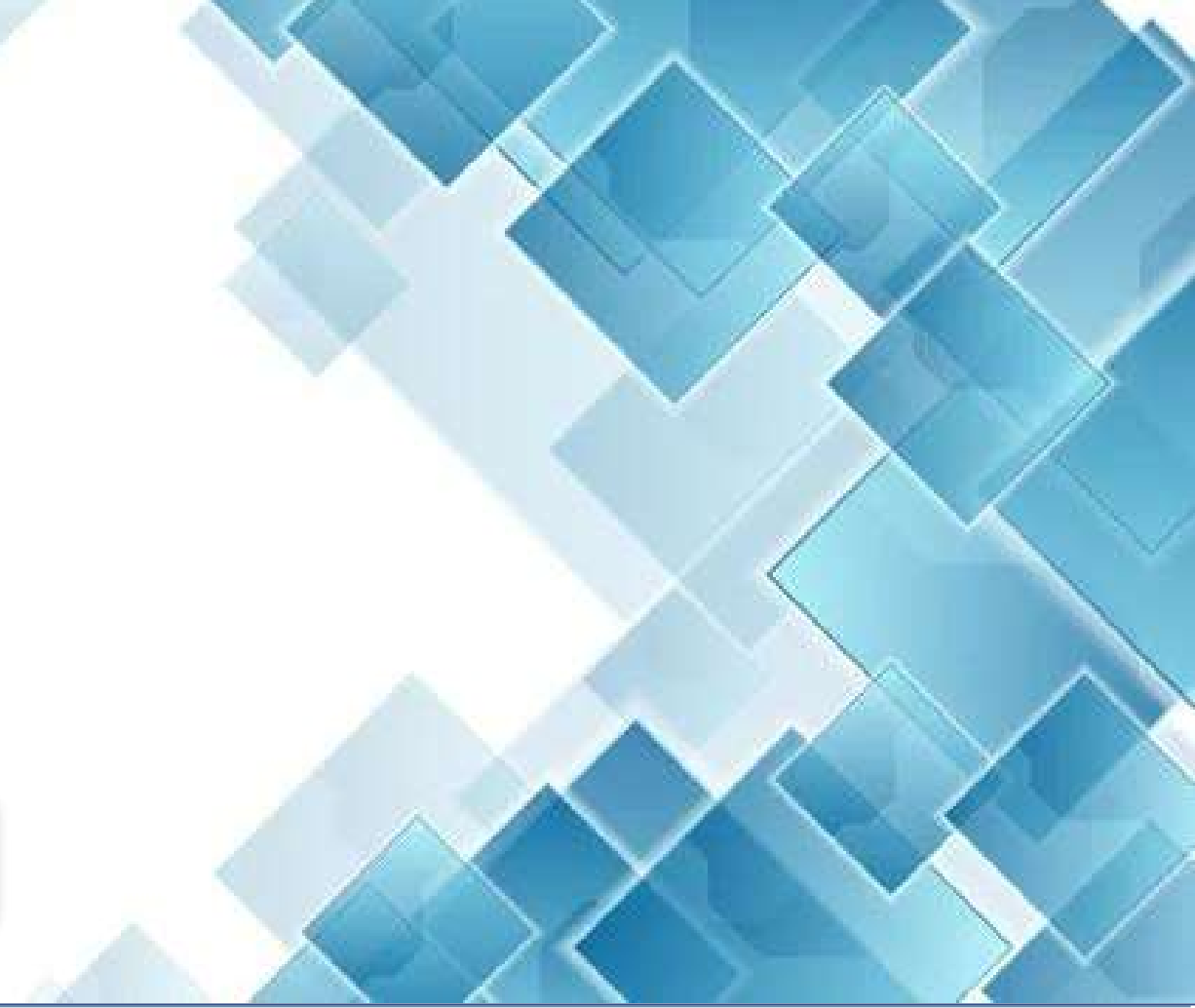
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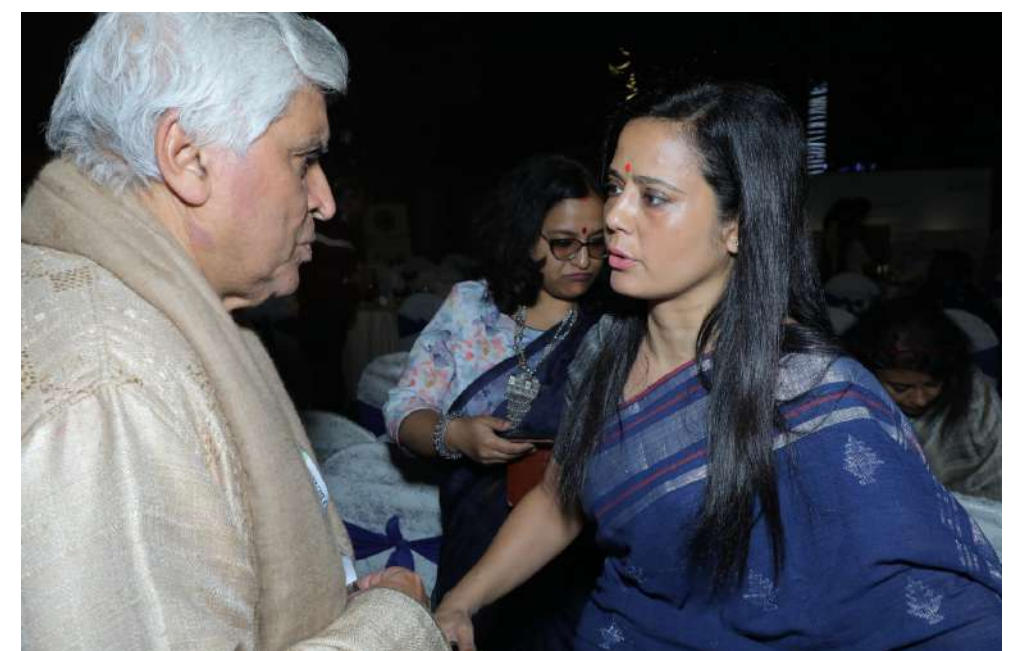
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Wealthapp Family

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CLIENTS' STORY

Dr. Anit Nath Mukherjee



Following are the client stories for this month.

Ahead of the Budget 2023, our client Dr. Anit Nath Mukherjee spoke on how Agriculture PLI schemes should be more productivity centric rather than production. It was telecast on CNBC TV18.

<https://bit.ly/3jiM5YI>



His article on Budget 2023 focusses on Agricultural Productivity. It has been published by The Print. You can read the full article here.

<https://bit.ly/3JlZQjX>

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Mr. Avishek Paul Chowdhury



Hotel Sonar Bangla, Taki is going to open Cafe Sundowner soon.



They have already inaugurated the Sky Bar.

Now you can now enjoy a coffee or drink with fabulous views.

For bookings you may contact:

+91-33-40060787, +91-8981398739, +91-9836056456, +91-9831500207

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LIFE AT WEALTHAPP

Employee of the Quarter(s) & Year 2022

Wealthapp declared Employee of the Quarter(s) and Employee of the Year 2022.



Luna Sinha

Employee of the Quarter
Jul to Sep 2022



Sudip Chakraborty

Employee of the Quarter
Oct to Dec 2022



Jayatee Das

Employee of the Year
2022

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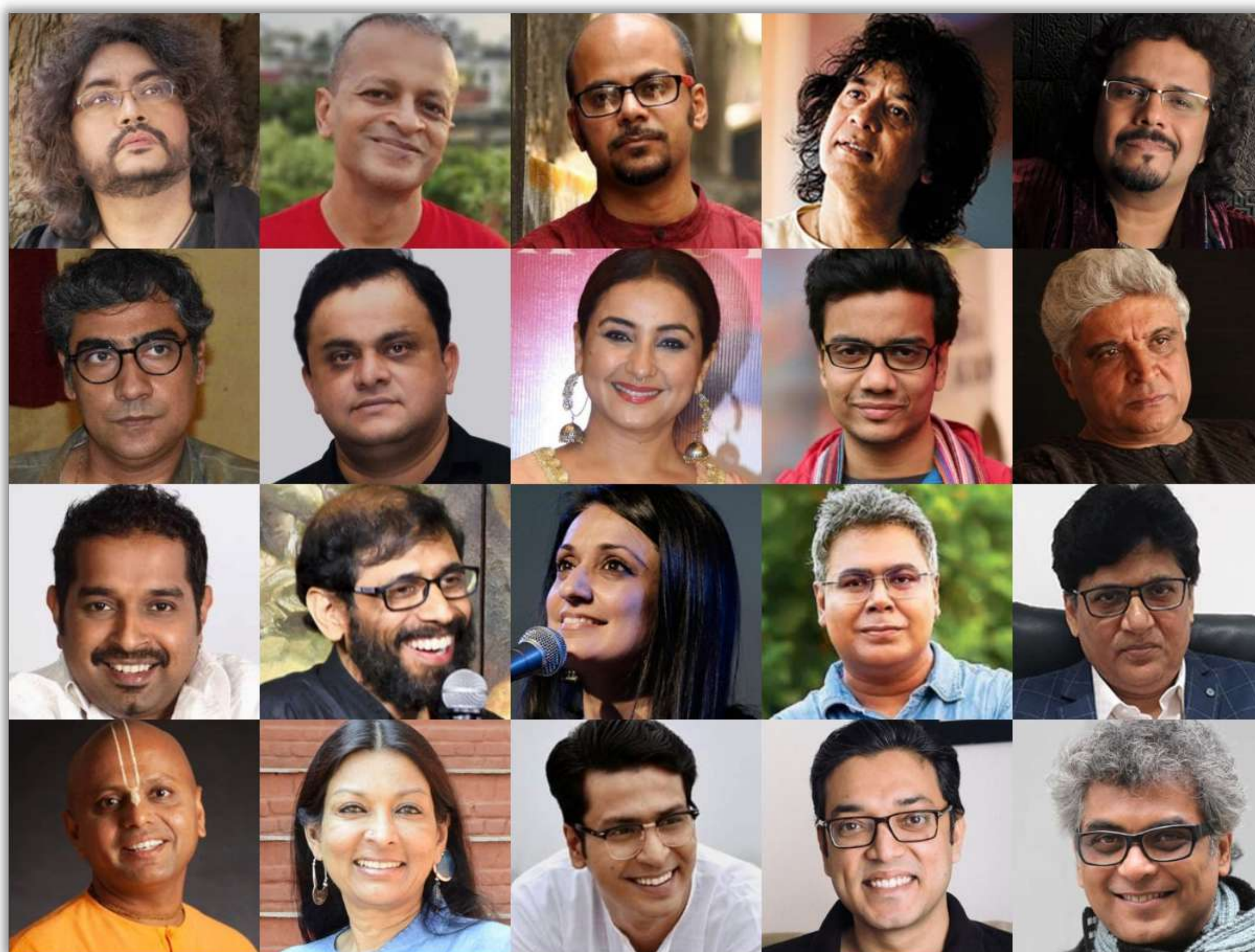
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LIFE AT WEALTHAPP

Kolkata Literary Meet 2023

Wealthapp co-sponsored the Kolkata Literary Meet 2023. It is one of the biggest star studded events of Kolkata spanning across 5 days at the Victoria Memorial Hall.



Above are few of the eminent speakers / guests at the KLM 2023.

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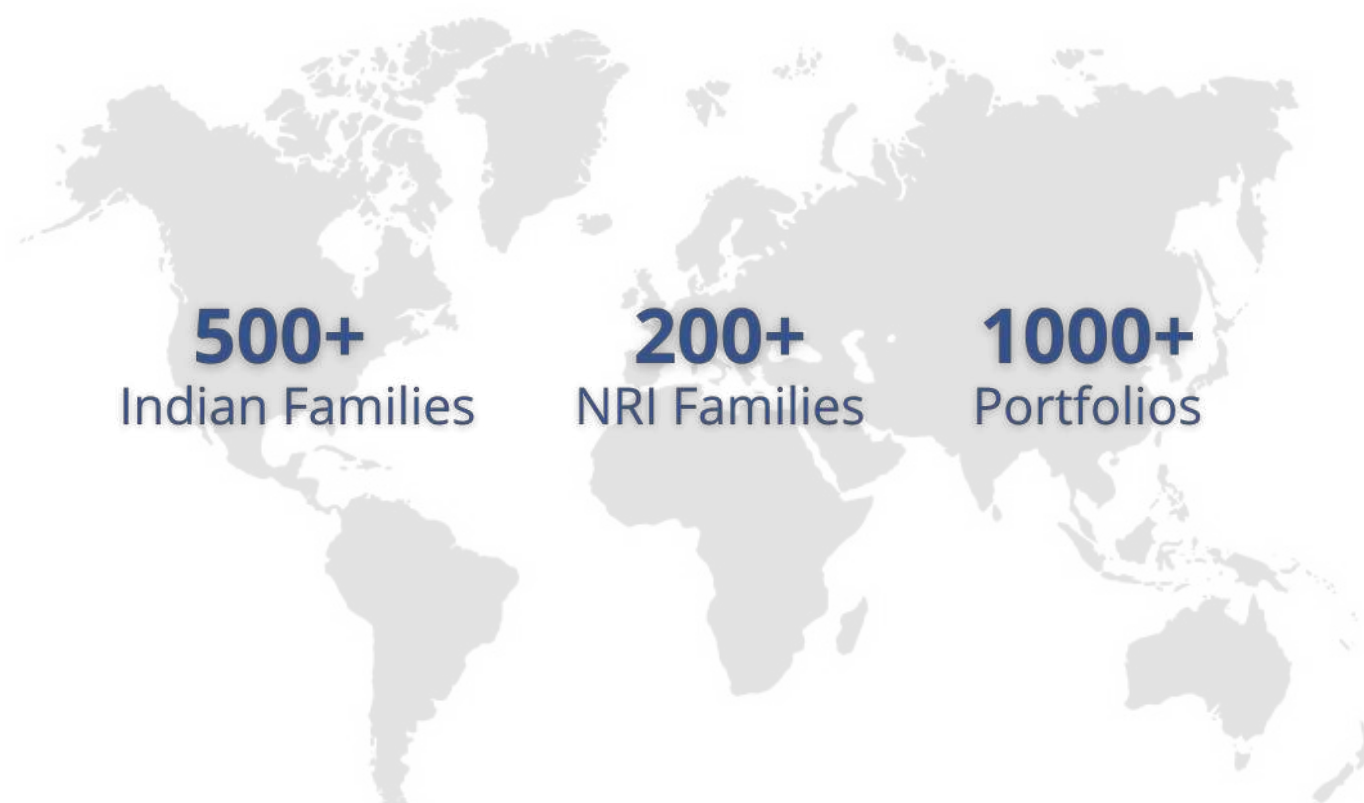
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