



## WELL THEE

Newsletter | May' 23



### Message from **Team WEALTHAPP**

Welcome to the May 2023 edition of WellThee.

WEALTHAPP now has a presence in Guwahati.  
Ex banker Promita Majumdar joins Team Wealthapp.

WEALTHAPP participated in Bengal's biggest business celebration,  
'BENGAL RISING 2.0'

WellThee, our monthly e-magazine is to  
celebrate our clients and their stories.

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

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

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# WEALTHAPP

Family Office

### “QUOTE OF THE MONTH”

OUR GOALS CAN ONLY BE REACHED THROUGH A VEHICLE OF A PLAN, IN  
WHICH WE MUST FERVENTLY BELIEVE, AND UPON WHICH WE MUST  
VIGOROUSLY ACT. THERE IS NO OTHER ROUTE TO SUCCESS.

**- PABLO PICASSO**

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LIFE AT WEALTHAPP

**Bengal Rising 2.0**

Wealthapp managed the **WEALTH ZONE** in Bengal's biggest business celebration, 'BENGAL RISING 2.0' held at Karunamoyee Central Park (Boi Mela Prangan) from 21st to 23rd April, 2023 organized by Bengal Business Council.



Mr Roopendra Narayan Roy (ex MD of PWC, Deloitte and Founder of Sumantrana Mgt Consultants)  
Mr Alapan Bandyopadhyay (Chief Secretary, West Bengal),  
Mr Chandra Sekhar Ghosh (Founder, MD & CEO of Bandhan Bank)  
with Mr. Soumyajit Ghosh (Founder - WEALTHAPP) & Mr. Anindya Paulchaudhuri (CEO - WEALTHAPP)  
at the **WEALTH ZONE**

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## CLIENTS' STORY

Mr. Avhishek Paul Chowdhury

Following are the client stories for this month.



Team Wealthapp congratulates Mr. Avhishek Paul Chowdhury, on receiving the 'Outstanding Contribution to Hospitality' award, for Hotel Sonar Bangla - Mayapur by IHC London and IIHM.



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Mr. Avhishek Paul Chowdhury (contd)

Hotel Sonar Bangla - Darjeeling is now open for business in a new revamped look.



*Apart from Mayapur and Darjeeling, Hotel Sonar Bangla is present at Tarapith, Puri, Mandarmoni, Kolaghat, Taki and Sundarban.*

For reservations,  
Call 033 4006 0787/ 8981398739 / 7407060480  
OR  
Email at [sales@hotelsonarbangla.com](mailto:sales@hotelsonarbangla.com)

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Mr. Sounak Ray



Congratulations to our client Mr. Sounak Ray, Director of "Samaritan Diagnostics" for officially launching a unique concept, 'Rhythm of Life', a music and melody themed OPD, first of its kind in Bengal, with the wholehearted support of music legends Usha Uthup and Soumitra Ray along with renowned doctors from Kolkata.



Incase of emergencies, they are just a call away, 86974 88720, 033 4060 8313, 033 4029 2156.

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Mr. Subir Ghosh



Proud moment for our client Mr. Subir Ghosh, Owner/Managing Director at Unirox Bicycles, when Dr. Shashi Panja Minister for Industries, Commerce & Enterprises, Government of WB, visited his stall at Bengal Rising 2.0. Mr. Chandan Ghosh, also our client, visited the Unirox stall.



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LIFE AT WEALTHAPP

**Bengal Rising 2.0**



**WEALTH ZONE** was exclusively curated by Wealthapp to cater to diverse financial needs ranging from Investments, Insurance, Real Estate, Loans, etc.

Bandhan AMC, Sotheby's International Realty, SBI Mutual Fund, Kedpro, MyMoneyKarma, Max D Well, HSBC Asset Management and Edelweiss Mutual Funds actively participated in the celebration.



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## Glimpses from the WEALTH ZONE

Bengal Rising 2.0



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LIFE AT WEALTHAPP

**Bengal Rising 2.0**

Cultural events included, live performances from IMAN CHAKRABORTY, LAKKHICHHARA, SOURENDRO-SOUMYOJIT, launch of music and trailer of the movie Mayaa, etc. Guests like Dr. Shashi Panja Minister for Industries, Commerce & Enterprises, Government of West Bengal, Sri Sujit Bose, MIC Fire and Emergency Services, Government of West Bengal and MLA of Bidhannagar, Rupankar Bagchi (Singer), Parambrata (Actor) graced the stage among many other eminent personalities.



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Sessions with WEALTHAPP and HSBC, iCICI PRU and DSP at Bengal Rising 2.0

## Climate Change - Investment opportunities



presented by

Samir Upadhyay



HSBC  
Asset Management



## Retirement Planning - for BBC Members

presented by

Abhishek Gupta



Neeladri Misra

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## Wealth Management for Women Entrepreneurs

presented by

Sumana Datta



Soumyajit Ghosh

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## Session with WEALTHAPP and HSBC, iCICI PRU and DSP at Bengal Rising 2.0 (Contd)



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Session with WEALTHAPP and partner Sotheby's at Bengal Rising 2.0





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Welcome to  
**Bengal's Biggest  
Business  
Celebration**

**23<sup>RD</sup> APRIL**  
Sunday

**4:30 PM**

**MEMBERS  
PAVILLION**

**বাংলার  
নবজাগরণ**  
১৪৩০

BENGAL RISING 2.0  
বাংলা নববর্ষ মহোৎসব

**Hill Homes**



presented by

**Subesh Ray**  
Sotheby's  
INTERNATIONAL REALTY

**Soumyajit Ghosh**  
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**Wealth Zone  
(Fully AC)**

managed by



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**21<sup>ST</sup>-23<sup>RD</sup> APRIL**  
Friday to Sunday | 12 - 10 PM

**KARUNAMOYEE CENTRAL PARK**  
(Boi Mela Prangan)

**FREE ENTRY**

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**ONE MINUTE READ**

MR. NEELADRI MISRA, ED - WEALTHAPP



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**FINANCIAL PLANNING VS. PRODUCT PUSH**



Financial planning provides a more comprehensive and personalised approach to achieving financial goals, while product pushing may prioritise short-term gains over long-term financial health.

- NEELADRI MISRA



Please click on the link to read the full article:

<https://bit.ly/3Nld0iT>

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### Roadmap to retirement - Planning for the longest vacation

Mr. Soumyajit Ghosh, Founder – WEALTHAPP, would be featuring in an interactive session with Ms. Sumana Datta, Financial Wellness Coach and AVP - Consumer Marketing, DSP Investment Managers. The session is named 'Roadmap to retirement - Planning for the longest vacation'. The video would be available across social media shortly.



Follow us for more updates.

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Mr. Rahul Ghosh, Manager IT - Wealthapp, got married to Piyali Ghosh on the 24th of April, 2023. We wish the newly married couple all the very best in life.



Mr. Rahul Ghosh - New Innings



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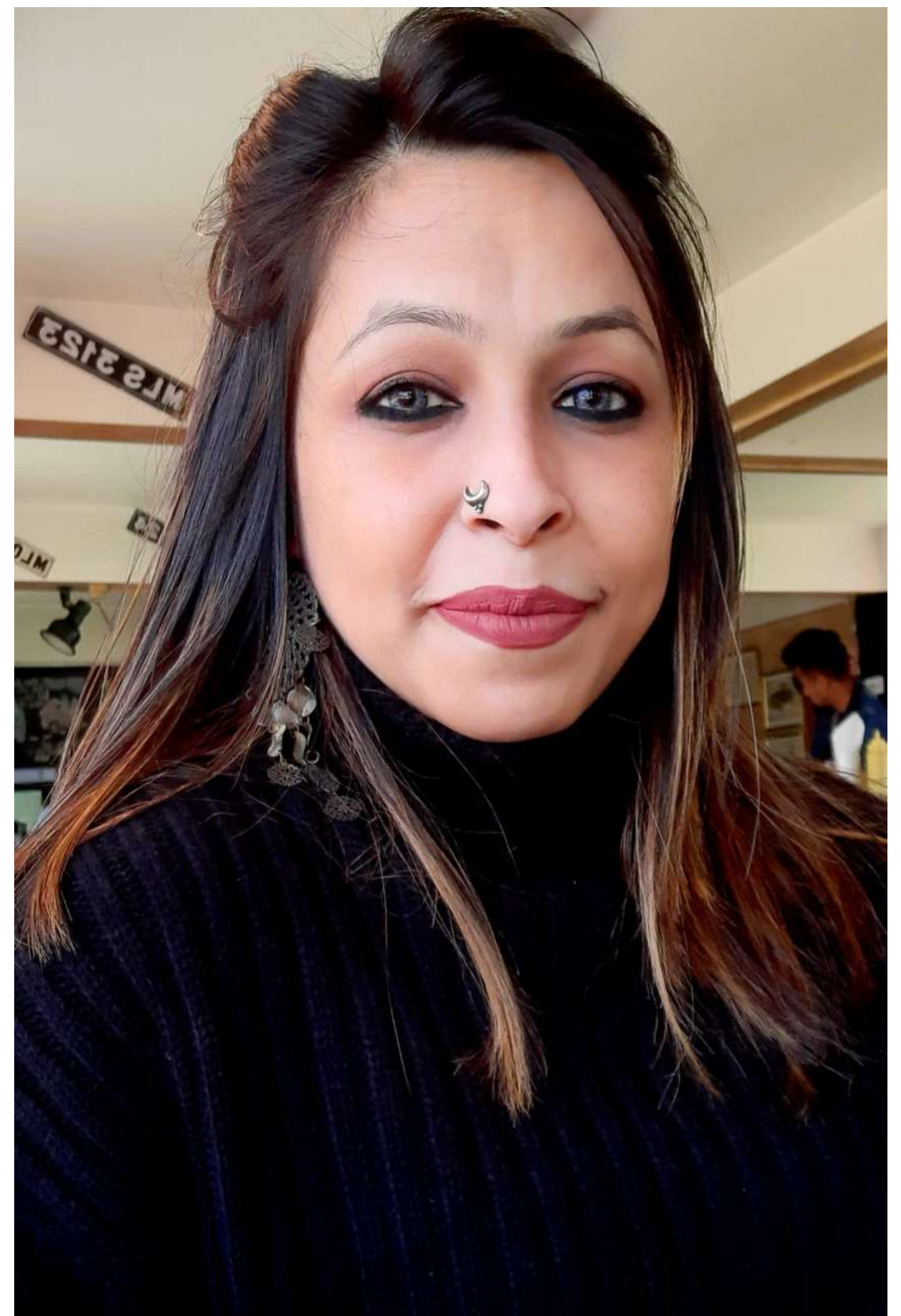
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**Ms. Promita Majumdar**

Ms. Promita Majumdar, joins us at Guwahati as Regional Director - North Eastern India. She is having more than 10 years of banking and Wealth Management experience and has previously worked with ABN AMRO Bank and HDFC Bank. Promita is a Fitness and Grooming coach by passion and a banker by profession.



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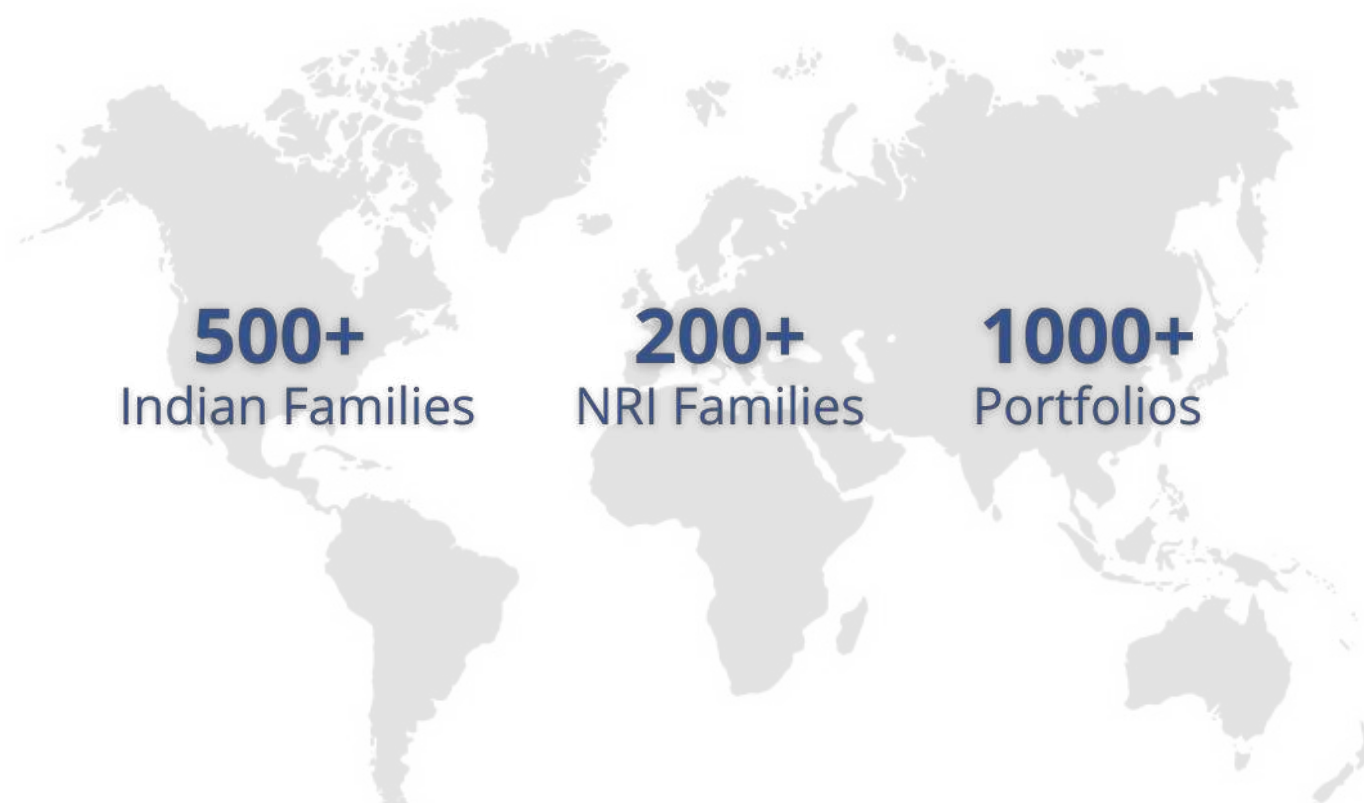
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Presence in Bengaluru, Delhi NCR, Guwahati, Hyderabad, Mumbai, Kolkata and Prayagraj



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