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**WELL THEE**

Newsletter | **Sep' 24**



## Message from **Team WEALTHAPP**

### **It's our MOMENT 1000 cr**

Welcome to the September 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.**

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### **“QUOTE OF THE MONTH”**

IT'S SIMPLE ARITHMETIC:  
YOUR INCOME CAN GROW  
ONLY TO THE EXTENT THAT YOU DO.

— T. HARV EKER

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WEALTHAPP at 1000 Crores

# The Telegraph

CALCUTTA THURSDAY 29 AUGUST 2024

## Wealthapp eyes family offices

A STAFF REPORTER

Calcutta: Wealthapp, a city-based wealth management firm, has surpassed mutual funds assets under management of ₹1,000 crore and has set its sights on reaching the next milestone of ₹2,000 crore faster than the previous one.

Founded in 2014, Wealthapp operates in eight cities and serves over 1,500 client families. The firm has expanded its portfolio beyond HNI wealth management by venturing into family office services.

In its family office division, Wealthapp serves as a custodian, managing financial and wealth-related solutions for its clients.

Anindya Paulchaudhuri, group CEO, Wealthapp told **The Telegraph** that the company is looking at innovative solutions such as dollar-based investment products for HNI clients and is also looking at opportunities in GIFT City in Gujarat.

The firm is also expanding its team in Mumbai, Ahmedabad and Bhubaneswar.

"In April 2020, amid the challenges of the Covid-19 pandemic, we made the bold decision to pursue business expansion. At

### ATA GLANCE

- Mutual fund AUM crosses ₹1,000cr
- Serves over 1,500 client families
- Keen on dollar-based products

that time, our AUM stood at just ₹180 crore. This achievement is a testament to the trust and confidence our clients have in our bespoke financial strategies," said Paulchaudhuri.

"Our objective is to sustain and amplify this momentum with plans to expand into new cities and strengthen our team across the country," he said.

"Reaching this milestone reflects our team's relentless dedication and expertise in steering clients towards their financial aspirations," said Soumyajit Ghosh, founder and CIO, Wealthapp.

"We eagerly anticipate building upon this achievement and guiding our clients through the ever-evolving financial landscape," said Rahul Johri, mentor and chairman, of Wealthapp Family Office.

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**CLIENTS' STORIES**

Following are the client stories for this month.

Mr. Subir Ghosh

Unirox MD and our client, Mr. Subir Ghosh, featured in a story in Times of India on the topic of Bengal's business.



**REFLECTING ON THE JOURNEY OF  
UNIROX THAT CAUGHT THE EYE**



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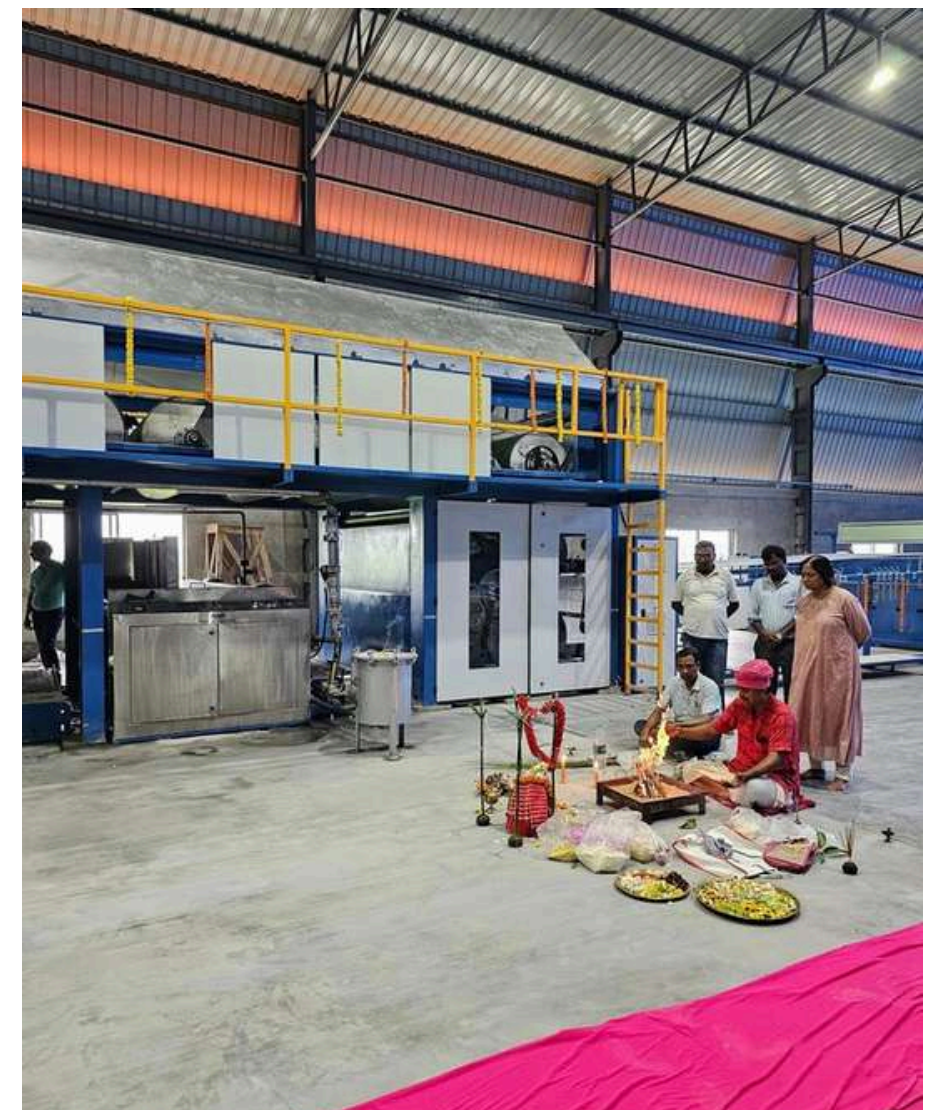
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Mr. Avhishek Paul Chowdhury

Team WEALTHAPP congratulates Mr. Avhishek Paul Chowdhury for the opening of their new weaving factory.



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WEALTHAPP - RCOG

A Seminar on 'Profiting from Changing India' was organised by WEALTHAPP at the Bengal Club for eminent gynecologists, all alumni of the Royal College of Obstetricians and Gynaecologists (RCOG).



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**WEALTHAPP at ITC Bhadrachalam**

WEALTHAPP organised two sessions on Investment Planning for the employees of ITC Bhadrachalam.



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### Birthday Celebration of Mr. Sekhar Basu

Team WEALTHAPP celebrated the 70th Birthday of Mr. Sekhar Basu.



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WEALTHAPP celebrated 1000 Crores AUM with clients.



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Ms. Ranjini Ghosh - RANGAKARMEE

Ms. Ranjini Ghosh performed the lead role in Rangakarmee's "Chanda Bedini"



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Ms. Ranjini Ghosh - RANGAKARMEE



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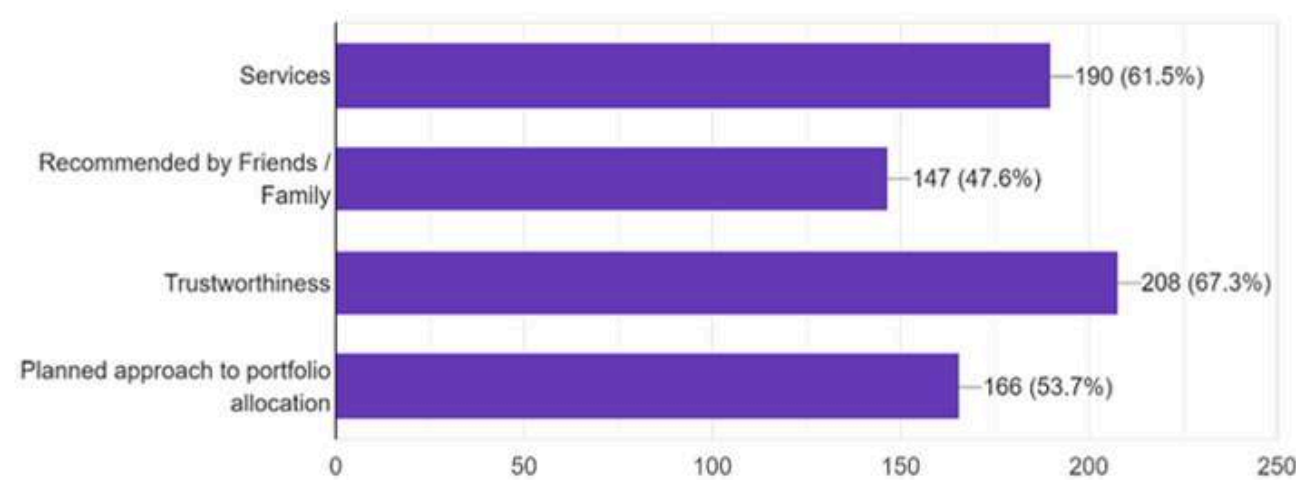


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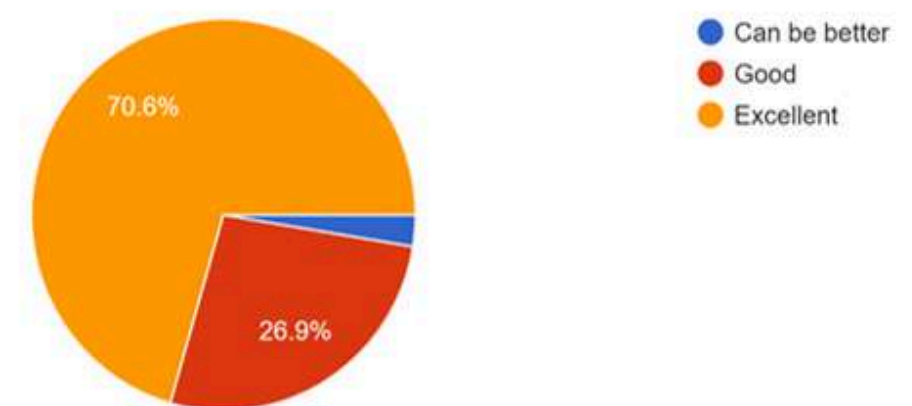
CUSTOMER SATISFACTION SURVEY

WEALTHAPP conducted an Annual Customer Satisfaction Survey.

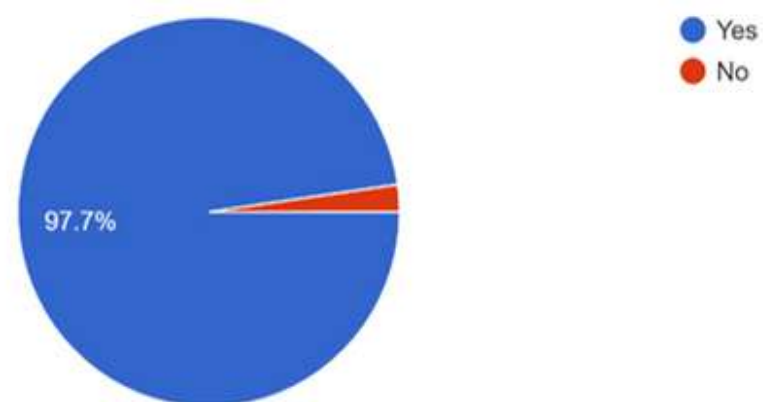
Please choose the reason(s) why you prefer investing with us. Can choose more than 1.  
309 responses



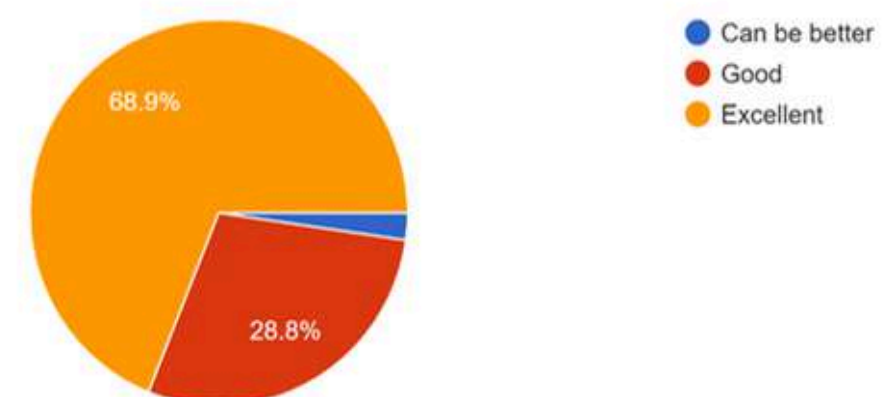
How would you rate the response time of WEALTHAPP, when you need any service / statement related support?  
309 responses



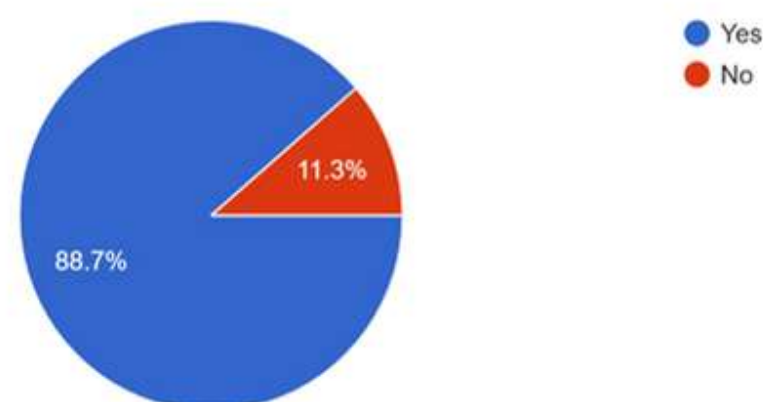
Do you get your monthly portfolio statements on time?  
309 responses



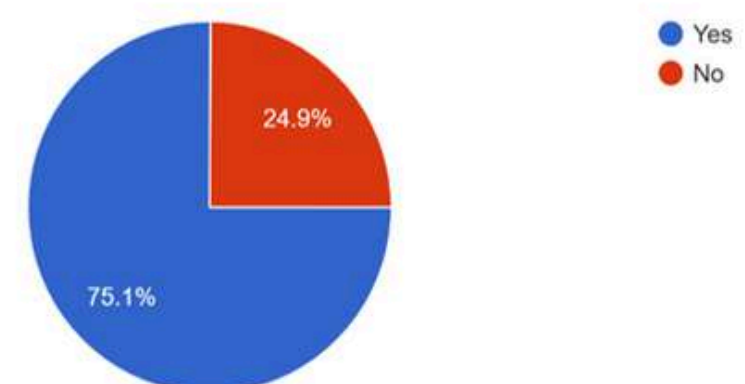
How has been your overall experience with WEALTHAPP?  
309 responses



Are you happy with our periodic review of your portfolio?  
309 responses



Have you referred any client to WEALTHAPP?  
309 responses



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**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. RAJEEV SETH, MR. SRINATH AND DR. K P POSWAL.

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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TO BE LIT!**

**SEE YOU NEXT YEAR  
FROM  
JANUARY 21 TO 26, 2025**





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NRI Families

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