

CORPORATE BROCHURE



WEALTHAPP

DISTRIBUTORS PVT LTD

AMFI Registered Mutual Fund Distributor & SIF Distributor

2026

EDITION

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

FOCUS | FORTITUDE | FINESSE

ARN - 85592

Presence in

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ABOUT US

WEALTHAPP was set up in 2014, by a team of experienced bankers with a vision to provide Unbiased Financial 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.

Presence in Bengaluru | Chennai | Delhi NCR | Hyderabad | Kolkata | Lucknow | Mumbai | Prayagraj

**PLAN
FIRST**

**PRODUCT
LAST**



WEALTHAPP GROUP COMPANIES



WEALTHAPP
family office

Trust and
Estate Planning



WEALTHAPP
global horizons

NRIs
Gift City



WEALTHAPP
business services

Capital Markets
VC / PE



HEALTHAPP
insurance

Insurance

CLIENTS UNDER MANAGEMENT

1600+
Indian Families

100+
NRI Families

2500+
Portfolios

OUR TOP ADVANTAGES



Global Network



Customised
App



Certified
Relationship
Managers



NRI Cell



Proven
Track
Record



One-Stop Shop



24/7 Support



Knowledge Bank

We are a Mutual Fund Distributor at the core of our work. We provide assistance to our clients for other investment services like Bonds, PMS, SIF, AIF, Insurance, etc.

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

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

OUR 6-STEP PROCESS



PRODUCTS



Mutual Funds



Alternative Investment Funds



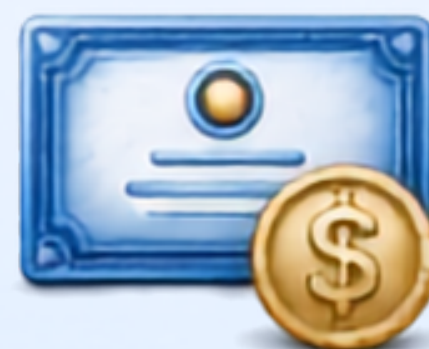
Specialised Investment Funds



HealthApp



NPS



Bonds



GIFT City



PRODUCTS

Alternative Investment Funds

Alternative Investment Funds (AIFs) provide access to investment opportunities beyond traditional asset classes. Through AIFs, investors can gain exposure to assets such as REITs (Real Estate Investment Trusts), InvITs (Infrastructure Investment Trusts), and other specialised unlisted investment opportunities.

Bonds

Bonds are fixed-income instruments through which investors lend money to governments, financial institutions or companies for a specified period. Depending on the terms of the instrument, investors may receive periodic interest payments and repayment of the principal at maturity.

GIFT City

GIFT City is home to the International Financial Services Centre (IFSC), a regulated financial hub designed to facilitate international financial services and investment opportunities. Domestic resident investors can invest in global markets, while global investors and Non-Resident Indians (NRIs) gain a streamlined gateway to India's high-growth economy, through GIFT City.

PRODUCTS

HealthApp

HealthApp Services is a health technology service built for insurance lifecycle management. We combine technology with expert guidance to bring clarity, so people can understand their coverage, close gaps, and move through the full insurance lifecycle with confidence — from advisory through claims and renewal.

Mutual Funds

A mutual fund is an investment vehicle that pools money from investors and invests it in securities and other permitted assets in accordance with the investment objective and strategy stated in the scheme documents.

National Pension System

National Pension System (NPS) is a government-backed retirement savings scheme designed to help individuals build a financial corpus for their post-retirement life. It invests your periodic contributions into market-linked assets like equities, corporate bonds, and government securities.

Specialised Investment Funds

SIF (Specialised Investment Fund) is a new investment vehicle introduced by SEBI that bridges the gap between Mutual Funds and Alternative Investment Funds (AIFs). It is designed for investors seeking more sophisticated investment strategies than traditional mutual funds.

SERVICES



NRI
Services



Portfolio
Management
Services



Investment
Services



SERVICES

NRI Services

WEALTHAPP provides mutual fund distribution and related client servicing support to Non-Resident Indians (NRIs), subject to applicable laws, regulations and the requirements of relevant AMCs, RTAs, authorised banks and other intermediaries.

Investment Services

Investment Services involve structuring and managing investments in line with an investor's investment goals, risk profile and investment horizon. They may include solutions across mutual funds, bonds, PMS, AIFs, NPS, Insurance and other eligible investment products.

Portfolio Management Services

Portfolio Management Services (PMS) involve professional investment management where investors hold direct ownership of stocks and securities in their own name. The investments are maintained in a dedicated demat account, giving investors direct visibility and ownership of the underlying assets.

KEY PEOPLE



Soumyajit Ghosh

Founder Director

A Certified Financial Planner with over three decades of experience across wealth management and financial services. He is a Director of India Sotheby's International Realty and has held leadership roles with SBI Funds, Standard Chartered Grindlays Bank, ABN AMRO Bank (RBS) and Citigroup.



Neeladri Misra

Executive Director

A financial services professional with over 30 years of experience in banking, insurance, fintech, and digital transformation. He has held senior roles at ABN AMRO Bank (RBS), Max New York Life Insurance, Bank of America, and other institutions.



Anindya Paulchaudhuri

Group CEO

A banking and wealth management professional with over 25 years of experience. He has held senior roles at Standard Chartered Bank, DBS Bank and Bajaj Allianz Insurance.



Jaydeep Pratap

Chief Operating Officer

A Fellow Chartered Accountant with 30 years of experience across banking and wealth management. He has held senior roles at ABN AMRO Bank (RBS), NatWest Bank and ICICI Bank.



Debankur Sengupta

Chief Business Officer

A Certified Financial Planner with over 20 years of experience across banking, financial services and wealth management. He has served as Regional Head at IndusInd Bank and has also worked with ABN AMRO Bank (RBS) and Yes Bank.



KEY PEOPLE



Payal Chatram

Director – Client Relations

She has over 20 years of experience in wealth management and has worked with ABN AMRO Bank (RBS) and Deutsche Bank.



Manpreet Sandhu

Director – Client Relations

She has 2 decades of experience in wealth management and has worked with IndusInd Bank, ABN AMRO Bank (RBS) and ICICI Bank.



Nidhi Upadhyay

VP - Client Relations

She brings in 20 years in banking, specialising in retail operations, NRI and private banking, with key roles at HDFC Bank and ICICI Bank.



Mohammad Tahir

VP & Regional Head

He brings in over 2 decades of banking experience and manages micro markets of UP like Allahabad and Varanasi.



Nikita Mishra

VP - Client Relations

A banking professional with 13 years of experience in retail banking, wealth management and financial services, with a focus on client engagement and service delivery.



Jayanta Mukherjee

VP - Client Relations

He has over 20 years of experience in retail financial services and has worked with Kotak Mahindra Primus, HDFC Bank, Tata AIG General Insurance and SBI General Insurance.



Ritunsha Lalwani

Senior Manager – Client Relations

A CA and Certified Internal Auditor, Ritunsha brings 8 years of experience from PwC, Capgemini, and McDermott.



EVENTS



Barge Party with Clients



Jungle Carnival at ITC Tribeni



Session at The LaLiT Great Eastern



Session 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



STRENGTH



Session at ITC Tribeni



Session with Helios Capital at Bengal Club



Team Picnic & Property Visit with Clients



Panel Discussions
across Bengaluru,
Hyderabad &
Gurugram

Prevention of Cancer



WEALTHAPP
cordially invites
YOU
to an exclusive session on
“Prevention of Cancer”
with
DR. SUDDHASATTWA SEN

GI Cancer Surgeon in Kolkata, West Bengal
MBBS (Gold medalist), MS (Gold medalist), DNB (All India Gold medalist),
MNAMS (IND), MRCS (UK), FICS (USA), DNB (SGE & HPB), FMAS (AMASI),
Fellow HPB & Liver Transplant (Sir Gangaram, Apollo, Del),
CC Lap Solid Organ Surgery (Ethicon),
CC Endohernia (Ethicon), CC Lap Colorectal (Galaxy, Pune) / Lap UGI surgery and VATS (Calicut), OB,
Fellow HPB & GIS (SGPGIMS, Lucknow / GB Pant, Del).
Sr. Consultant and Former Head of Dept. Dept of GI HPB Surgery and GI HPB Oncosurgery, AMRI Hospital, Dhakuria, Kolkata.
Jt Director & Sr. Consultant | GI HPB and GS Dept | Medica Superspecialty Hospital, Kolkata (Former)
Formerly Sr. Consultant Apollo Gleneagles, Fortis Kolkata, Belle Vue Kolkata, CMRI, Woodlands, EEDF & SASK.

SAVE THE DATE
**AUG 09, 2021
(MONDAY)
8:00 PM**

zoom
<https://bit.ly/3jj7cGm>

www.wealthappdistributors.com services@wealthaponline.com +91 8274876431

WEBINARS

Succession and Estate Planning through WILL



WEALTHAPP
finance simplified

Have you made your **WILL** ?
Is it **IMPORTANT** ?
Do you need to **CONSULT** a legal person to make a **WILL** ?
Can a **WILL** be **WRITTEN** on a plain paper ?

To answer these questions and more,
JOIN US on
**AUG 27, 2021
(FRIDAY)
7:00 PM**

zoom

SUCCESION AND ESTATE PLANNING THROUGH WILL
in association with
IDFC
IDFC MUTUAL FUND

CIEL Trainer:
Sangeeta Roychaudhuri
Recognized among "Top 101 Inspiring Women in India" in 2015
"Corporate Diva Winner" in 2016
Author of "Celebrate your wings". #2 Best Seller in Amazon
Worked with CRISIL, Amicorp Group, Dun & Bradstreet
Alumnus of St. Xavier's Calcutta & Haas School of Business, UC Berkeley, California
Regular speaker at various forums addressing areas of Wealth Management, Succession & Estate Planning, etc.

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zoom

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Parenting in the Covid Era



WEALTHAPP
cordially invites you
to an exclusive Webinar on
PARENTING IN THE COVID ERA

Children have not visited their schools/colleges for the past 18 months.
They have spent more time on cell phones than playing with their friends.

Parents are facing an **All New Challenge...**
To discuss these issues and more,
JOIN US on
**SEP 15, 2021
(WEDNESDAY)
7:00 PM**

zoom

Dr. Charles C. Schreiner
PhD - Child Psychologist and
Entrepreneur based in California, USA

Mahacharya Shri Sourabh J. Sarkar
Visionary Educationist and Founder
of the KarmYog for 21st Century Foundation.

SAVE THE DATE
**SEP 15, 2021
(WEDNESDAY)
7:00 PM**

zoom

You may join the FB Page, "Parenting Unlocked"
for more videos and post your queries there as well.

“These masters have helped many kids achieve “Top of the class”.

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VOICES OF WEALTHAPP

Client Testimonials

Voices of WEALTHAPP

To me, that's what I tell others also, that WEALTHAPP is the best organisation if you want to grow your wealth.

Mr. Subrata Dutta

Managing Director, George Telegraph, Kolkata

Voices of WEALTHAPP

Both the app and website are really easy to use. Everything is done paper free.

Mr. Vivek Suraiya

Partner at Khimjee Hunsraj, Kolkata

Voices of WEALTHAPP

It's a great decision we have made, when we committed to WEALTHAPP.

Ms. Debarati Guha

HR - Ministry of Defence, UK

Voices of WEALTHAPP

I've trusted WEALTHAPP. Over the years they have performed well and given me consistent good returns.

Mr. Subir Ghosh

Founder and MD – Unirox Bikes
Kolkata

Voices of WEALTHAPP

Experience has been really good. I only see the reports coming every month and how the money is growing.

Mr. Subesh Ray

India Sotheby's International Realty
Kolkata

Voices of WEALTHAPP

Thanks a lot to WEALTHAPP for supporting me in my financial security. I feel very grateful to them. At 63 years of age, I am very comfortably placed.

Col. Harish Joshi

Retired from Indian Army
Delhi NCR

WEALTHAPP HOLIDAY ADDA

Click to know what our clients have to say about their experience with WEALTHAPP.

A TRIBUTE TO OUR CLIENTS



FROM TEAM WEALTHAPP

Follow our YouTube Channel for more.

WEALTHAPP CLIENT SATISFACTION

Over 97% of WEALTHAPP clients have reported satisfaction with their experience over the years.



Source: WEALTHAPP Annual Client Satisfaction Survey - 2024, 2025 and 2026

CONTACT US

WEALTHAPP Distributors Private Limited

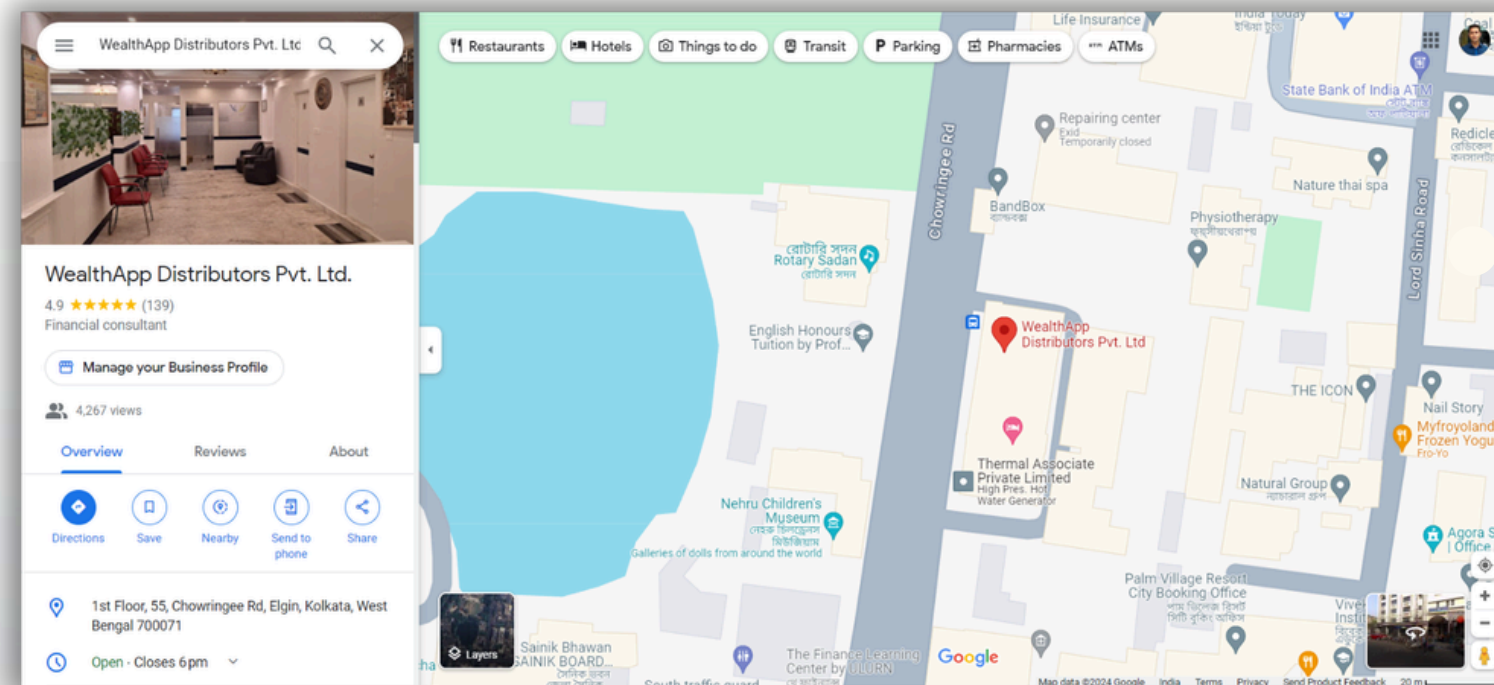
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Email: services@wealthaponline.com

Website: www.wealthappdistributors.com



Presence in Bengaluru | Chennai | Delhi NCR | Hyderabad | Kolkata | Lucknow | Mumbai | Prayagraj





WEALTHAPP[®]
finance simplified

AMFI Registered Mutual Fund Distributor



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



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finance simplified

AMFI Registered Mutual Fund Distributor & SIF Distributor

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