WEALTH MANAGEMENT SPECIAL

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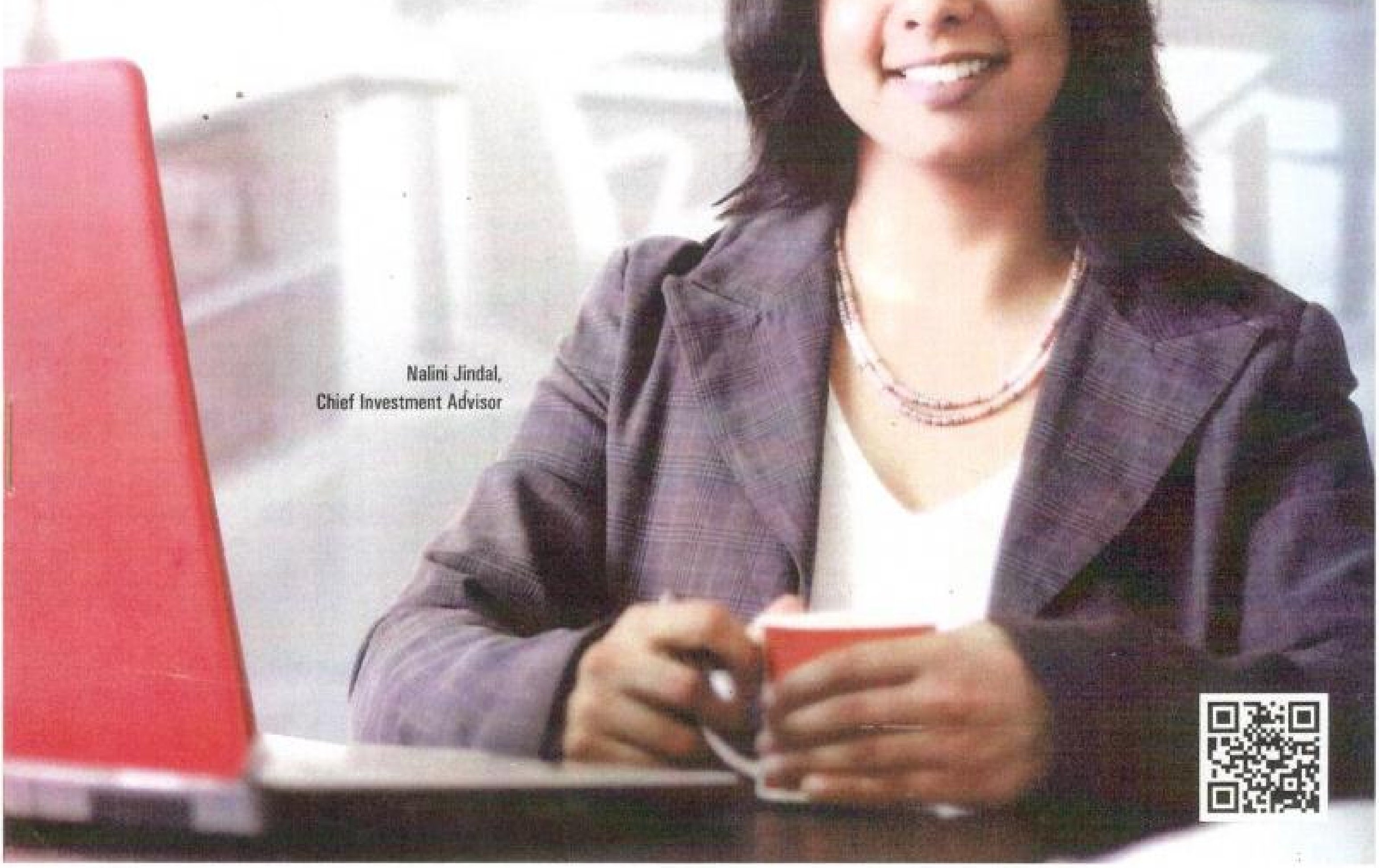
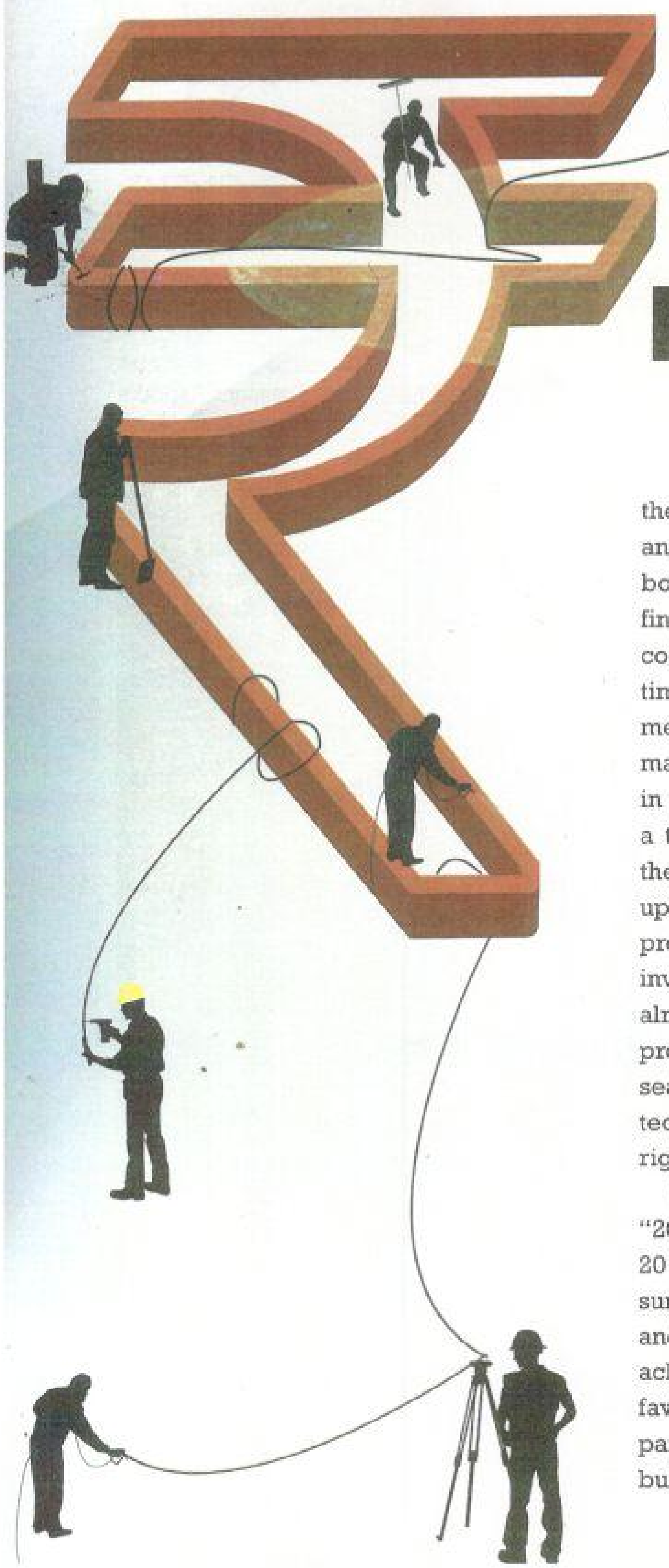
IN MY OPINION
Rohan Bhargava,
Co-founder, CashKaro.com

INTELLISTOCKS: YOUR WEALTH BUILDING PARTNER



Nalini Jindal,
Chief Investment Advisor



siliconindia CONSULTANTS 20 MOST PROMISING

WEALTH

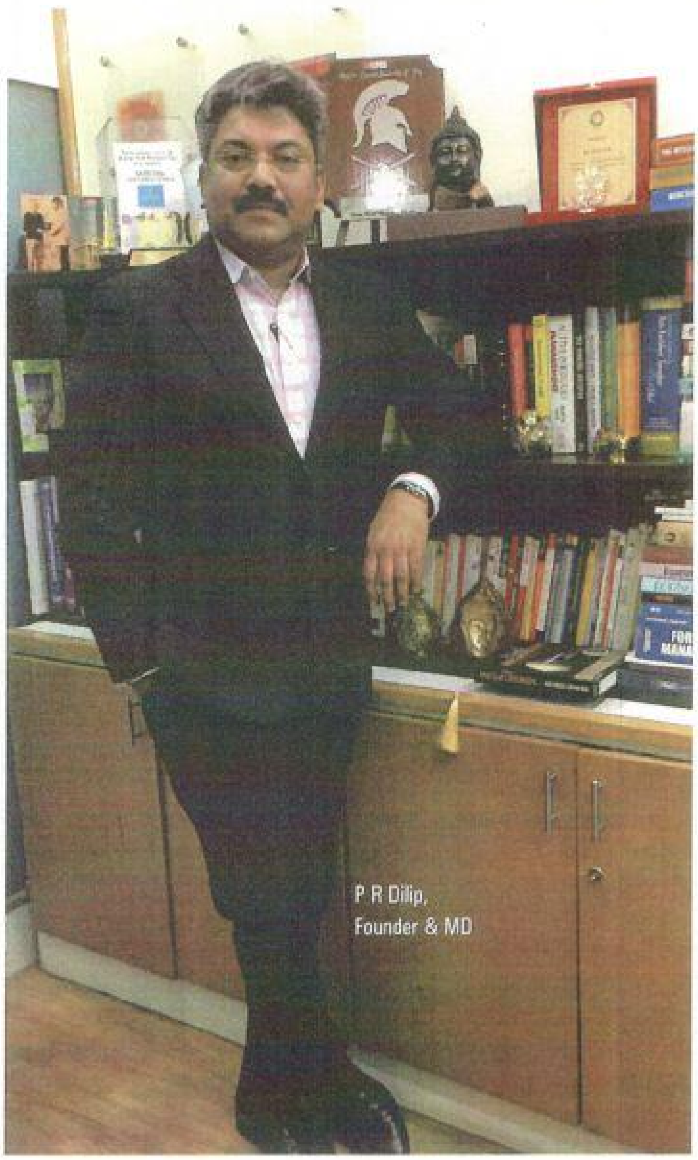
MANAGEMENT CONSULTANTS - 2017

The Indian economy has witnessed a robust growth over the last few decades which has helped the country's wealth management sector to evolve at a tremendous rate. Evolving as the fastest growing sector of the country, Wealth Management has managed to influence the revenue of the country as well. With financial advisors and wealth managers taking the front seat in the country's booming economy, their recent act of catering to other financial services in the remote of the remotest areas of the country has come up as one of the key projects of the current time. Instead of limiting their operations within the comforts of metropolitans and cosmopolitans, wealth managers are now making every possible attempt to spread financial awareness in the remote sections of the society. This has definitely set a trail for an attractive future of the country as well as for the investors. Although there is much room to enhance and upgrade the skill set of present wealth management advisory professionals that is sure to boost the sole interest of the investors. However, it is evident that the wealth managers have already set a niche by adhering to the global standards while providing exclusive wealth and financial solutions, delivering seamless investment options along with employing suitable technologies into the financial model which has bought them rightful acknowledgement for their client's success.

This edition of siliconindia Consultants brings you the "20 Most Promising Wealth Management Consultants - 2017", featuring some of the prominent consultants who surpassed catering unbiased wealth advisory solutions and services by helping its clients to quantify and achieve their financial goals. The proposed list comes in favour to companies that look for felicitous consulting partner, who align the specific needs along the healthy business profits.

IMPETUS WEALTH MANAGEMENT: A HOLISTIC APPROACH TOWARDS ADDRESSING UNIQUE FINANCIAL GOALS

By Deepshikha Singh



P R Dilip,
Founder & MD

Managing the available resources and meeting one's business objectives using the same is a talent which every business owner seeks today. However, managing finances and simultaneously keeping the profit ratio higher within a company is not every businessman's cup of tea. With increasing income and affluence in India, wealth management is slowly establishing itself as a very important form of service that can be utilized by all especially people who may not have sound financial background but are interested in safeguarding and growing their wealth in a systematic way. Sensing the rising need for process-based investment services as an opportunity, P R Dilip, an industry veteran with over two decades of experience in Indian Capital Market, teamed with few professional friends in 1994 and established Impetus Wealth Management. Set up initially as an equity research firm, today Impetus has evolved into a full-fledged wealth management company, providing Portfolio Management Services under the Portfolio Manager Regulations of SEBI.

Designed to Create, Grow and Protect Your Wealth

Headquartered in Mumbai, Impetus Wealth Management was built with a clear motive of providing research based investment advisory services for institutional as well as individual investors. A SEBI registered Portfolio Manager; this company is globally renowned for its unique range of services which include Portfolio Management, Wealth Management services, Estate Planning, Transaction Platform for Equity, Mutual Fund Schemes and Insurance products. In an attempt to address the stumbling blocks of wealth management industry, Impetus has also created its own Investor Profiling System (IPS) that has helped the company address the investment needs of large number of High Net-Worth Individuals (HNI) from different walks of life from different parts of the world.

Keeping up with their objective, Impetus assists its customers to clearly define their financial goals, time frame, risk appetite and available resources. Based on the results of its exhaustive client-profiling process, Impetus suggests suitable portfolio of assets to the respective investor, while also considering the key aspects such as capital preservation and optimum risk adjusted growth. Once an investor understands and accepts the suggested investment philosophy and process, the dynamic team of Impetus welcomes them to Impetus family through an agreement as per the relevant regulations and thus the journey begins. Acknowledging the client-centric services of Impetus, Cap. Ganesh Raja Dhanuskodi, a Merchant Navy Professional adds, "If it can be summed up in short, I would describe the work done by P.R.Dilip as, 'having thorough knowledge of the subject and executing with utmost integrity'. The combination is a rare commodity. One need not think twice in recommending him for the area of work he is involved in."

The Enabling Process

"At Impetus, we believe that, as the financial goal of each individual is different from another, the financial planning for each individual also has to be different and personalized. We are an unbiased wealth management firm and our agenda is not to sell any financial product to our investors. Instead, we educate our investors about the need-based financial planning rather than trend-based investments as what is in trend today may not help an investor to achieve his/her financial or life goals going forward. Thus, enabling

> Impetus Wealth Management has successfully evolved into a full-fledged wealth management company, providing services under the Portfolio Manager Regulations of SEBI

the investor to take the right investment decisions," speaks P R Dilip, Founder, Impetus Wealth Management.

The Big Picture

Highlighting the present investment market, Dilip utters, "I expect an exponential growth of investors with substantial investable surplus in the country. More interestingly, there is a visible shift in the preference of asset class among the new investors, a shift from traditional fixed assets (Real Estate and Gold) to financial assets (Equity, Mutual Fund Scheme and many more). Though there is huge growth in the number of new investors in the country, the number of SEBI Registered Investment Advisors is not growing with the same pace."

Growth Plan with a Social Angle

Impetus Wealth Management, a SEBI Registered Portfolio Management Company has the required regulatory registration, adequate knowledge, experienced and skilled manpower, scalable systems with robust technology to cater to the investment needs of large number of Investors from any part of the world, seeking investment opportunities in Indian Capital Market. In order to attain global scale, Impetus is also associating with quality wealth managers from different geographies and training them on its time-tested Wealth Management Process, facilitating them to provide the same quality of service in the remotest of the remote places of the country.

Discussing on the future roadmap of Impetus, Dilip says, "Our plan is to enable even the small-town investors to access the highest quality of financial services using our knowledge, experiences and our technology backbone well within the regulatory environment. Farther than the growth of Impetus Wealth Management, this approach serves dual social purposes, offers quality investment service to people in the small towns and provides quality employment for the right candidates in the small towns. "

20 MOST PROMISING WEALTH MANAGEMENT CONSULTANTS - 2017

COMPANY	MANAGEMENT	DESCRIPTION
Aadi Wealth Management New Delhi aadiwealth.com	Amit Jain, Founder, CEO	A premier wealth advisor firm providing integrated financial services to institutional, corporate and individual clients across Real Estate, Mutual Funds,Fixed Income, Private Equity and Loans
Angel Broking Mumbai angelbroking.com	Vinay Agrawal, CEO, Angel Broking	Provides financial services to retail clients and their services include online stock broking, depository services, and commodity trading and investment advisory services
Armstrong Capital Advisory Bangalore armstrong-cap.com	Manju Mastakar, Director	A dedicated team providing goal based financial planning, portfolio management service, wealth management service for individuals and businesses
ASK Wealth Advisors Mumbai askfinancials.com	Asit Koticha, Chairman and Founder	An independent company specialising in Wealth Advisory and Family Office solutions to UHNI individuals and families, both Resident as well as Non Resident (NRIs)
BFC Capital Lucknow bfccapital.com	Sharad Bindal, Chief Marketing Officer Sunil Gupta, Chief Executive Officer	Works on financial advisory model and provides recommendation for almost all the wealth management products
Edelweiss Asset Management Mumbai edelweissfin.in	Vikaas M. Sachdeva, Chief Executive Officer	Providing a broad range of financial products and services to a substantial and diversified client base that includes corporations, institutions and individuals
Franklin Templeton Mumbai franklintempletonindia.com	Vivek Kudva, Managing Director	Offering specialized expertise across styles and asset classes, all supported by the strength and resources of one of the world's largest asset managers
Imperial India Consultant Pune impperialindia.in	Dhammadeep Shaligram Gajbe, Managing Director	An independent financial advisory services firm delicately offering services to individuals, families and trusts with personalized assistance in pursuing client's financial goals
Impetus Wealth Management Mumbai impetusindia.in	P R Dilip, Founder and Managing Director	Focused wealth management advisor designed to create, grow and protect personal finances through its customized, comprehensive and hassle free ways
Intellistocks Gurgaon intellistocks.com	Nalini Jindal, Chief Investment advisor	Working with a mission is to empower millions of Indians to build wealth through providing a disciplined and ethical stock recommendations and financial advisory services by hand picking the best multi-bagger stocks for a unique personalised portfolio