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# WEALTH MUNSHI

**BUILD PERSONAL & CORPORATE WEALTH WITH THE  
MOST TRUSTED FINSERVE**





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MOST TRUSTED FINSERVE



**Niyesh Sanghi,**  
Founder, Wealth Munshi .  
Alumnus of NIFT, Delhi & Hyderabad Public School,  
Hyderabad



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**W**ith the use of contemporary digital tools, reputable financial institutions utilize digital wealth management to help garner augmented engagement ,transparency, promote collaboration & contribute towards filtering the performance of financial assets.

Emerging as a premium platform for digital Lifestyle Management & Wealth Analysis, Wealth Munshi is benefitting the business of its clients by transforming the span of wealth management across all industry segments.

Envisioning digital wealth advisory as the future of the financial service sector, Wealth Munshi was established in 2017 by Niyesh Sanghi, a successful serial entrepreneur & investor since two decades.

Emerging as a phenomenal player in this domain, Wealth Munshi has proved itself to be a frontrunner in the financial service industry by the virtue of its impeccable industry-specific services across Financial, Wealth & Succession analysis which helps the Investor define & achieve their Company's & Personal financial goals by using different investment vehicles. Standing on the foundation of sturdy relationships, rather than transactions, Wealth Munshi is based on the foundation of trust, ethics & care.

Along with a win-win approach & tag line – ‘Aapka Paisa Hamara Bharosa’ – Your Money Our Trust.

Wealth creation is an art & financial markets are dynamic which make wealth creation an ongoing process. Wealth has to be nurtured, cared & reviewed regularly with an expert & it's not an overnight magic. “With our 20 years of rich experience, we have understood that there are many complex products available in the financial markets. So, rather than concentrating on products & services, we would advise hiring an expert, guide, mentor, or coach with a credential history who not only understands you & your company's needs but is also ready to spend time & energy to make a genuine effort in providing a proper solution than buying a product.

Choosing the right coach is as difficult as finding the perfect diamond cut. If done well from the beginning, you will not only achieve your dream life but also enjoy this journey of attaining your goals,” states Niyesh Sanghi, Investor ,Investing Coach & Founder, Wealth Munshi.







### Maintaining An Unperturbed Interaction and Connection with Its Investors

Hand-holding the customers starting from onboarding till the achievement of financial goals with a constant education via its social media platforms & personal finance web series. Wealth Munshi has bagged close to 151 Awards in India & globally.

Apart from that Numerous international Investors have been guided in managing portfolio across the globe digitally.

Remaining constantly in touch with the Investors & proactively managing the portfolio irrespective of different time zones of the world, Wealth Munshi is acclaimed to

### USP of Wealth Munshi

A one-stop-shop for all financial decisions.

Providing solutions for wealth preservation, enhancement & distribution.

Migration services.

End-to-End digital solutions which are paperless & seamless.

Goal-Based curated financial solutions for corporates & families.

be a never-sleeping organization by its Investors. Having Presence Across 6 Continents, Wealth Munshi has been successful in maintaining an unperturbed interaction & bonding with its Investors.

“Every investor is unique & has his own set of challenges. One of the biggest challenge we face on the wealth creation journey is making the investor follow a disciplined approach to build a substantial portfolio. It takes anywhere between 3-5 years minimum to create a healthy portfolio & many times the investors lose patience much before 5 years but the ones who have lasted have created wealth for generations. Having a vast range of clientele from Corporates, Realtors, Family Office, Educational Institutions, Co-Operative Banks, Business Owners, Promoters, Founders, National Sports Champions, Pilots, NRIs, R2I ( Returned to India ), PIO ( Person of Indian Origin ), Chartered Accountants, Corporate Leaders, Celebrities, Doctors, Government Officials, HNI & Ultra HNI, Human Resources Professionals, Millennials, Start UP and so on,” shares Niyesh.

### Creating a Financially Literate India

Growing exponentially since its inception, Wealth Munshi is predominantly engaged to acquire the latest technologically advanced tools to map longer distances with numerous milestones in the future. With comprehensive analytics & digital platforms, the firm has been able to help meticulously manage every rupee with an accurate forecast. Also, digital applications like financial health check platform, portfolio tracker, digital locker, app & websites are updated regularly to enhance the investors’ experience.



Niyesh Sanghi,  
Founder

### Kynan Chenai, Asian Shooting Champion for India .

Being a full-time sportsman for India, Wealth Munshi manages my financial assets which ultimately leaves me stress-free to focus on my performance for India. We have been associated with Wealth Munshi for more than a decade now. Along with smooth digitalization to streamline our resources, Wealth Munshi has understood my needs & we are now fixated on achieving long-term goals.

### Rohitashwa Manohar Mujumdar, Additional Commissioner Income Tax, Chhattisgarh

While most of my investments were scattered & offline, Wealth Munshi helped me to consolidate everything in one platform digitally. All of my investments along with my entire family’s portfolio is now handled by Wealth Munshi.

### Vinay Vaidya, Director, Amazon

Although I was quite conservative about my investments, Wealth Munshi convinced me to take a certain proportion of my investment into a higher risk component. Apart from that, all my investments were scattered but the team of Wealth Munshi guided me to have a bird’s eye view on my diversified portfolio in India & US. Despite the covid situation most of my investments are doing quite well.



**WEALTH  
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IS AN ART &  
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PROCESS**

Led by a leader who is as successful as his passionate team, Wealth Munshi intends to replicate its success with franchisees to spread financial literacy to the youth of India. "We Wish to acquire & collaborate with other like-minded financial services platforms and fintech firms to grow together in nascent locations, especially in 2 & 3 tier cities. Encouraging new partnerships with our franchise model, our partners can grow together, educate the youth & benefit from our promoters who have rich in & on-field experience. By joining hands, we can dream about creating a financially literate India,” Niyesh Sanghi, Investor ,Investing Coach & Founder, Wealth Munshi. 



ONLINE FINANCIAL PLANNING COMPANY 2021



# **siliconindia** 10 MOST PROMISING ONLINE FINANCIAL PLANNING COMPANIES IN INDIA - 2021

*Wealth Munshi*

*recognized by **siliconindia** Magazine as*

**siliconindia** 10 MOST PROMISING  
ONLINE FINANCIAL PLANNING  
COMPANIES IN INDIA - 2021

*The annual listing of 10 Most Promising  
Online Financial Planning Companies In India - 2021 recognizes not only the excellent  
solutions and services for financial planning but also the foremost business acumen of the companies*

A stylized signature in black ink, appearing to read "E. Das", is positioned above the name of the Managing Editor.

Emmanuel Christi Das  
Managing Editor