

Careers@ WealthMunshi

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🌐 www.wealthmunshi.com



The future of financial products



- Financialization of savings will continue
- India's economic potential key driver
- **Major shift in communication of all financial products**
- **Social media awareness, outreach is critical**
- User experience (UX), and user interface (UI) key
- Thought leadership is a differentiating factor
- EEE model- equip, educate, engage

The Financialization of savings



Sum assured at 19% of GDP, mutual funds AUM < 20%

The importance of advice

- “Trust”-most common reply to "what's the problem today?"
 - India Investments has 193K+ members
 - **SEBI RIAs:< 1500, MFDs:126K**
 - MFD: incentives must be aligned with customer
 - SEBI RIA model skewed toward AUMs
 - Advice will keep evolving going forward



Why Wealth Munshi?



- Highest impact creating startup in the **world of personal finance across the globe**
- Join Wealth Munshi if **you want to work with the sharpest minds, experienced team & manage wealth of the 1% wealthiest families.**
- **The Only Start Up That Provides All Financial Solutions Completely Digital End to End.**



Wealth Munshi - on personal financial solutions



- **Started in 2017 Now Serving more than 3700 Families in a short span of 5 years**, beating some of the biggest names in the industry
-
- **500+ success stories**

Technology that's ahead of its times - one of the most digitally efficient organization in the fintech space providing end to end solutions digitally for :

- **Financial Planning**
- **WealthManagement**
- **Succession Planning**

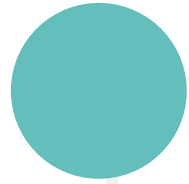


Growth Story 2017



2017

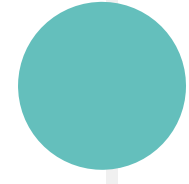
Born



Wealth Munshi was born envisioning Digital Investing

2018

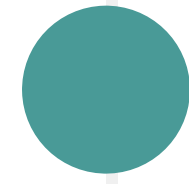
Build



Digital Investing Platforms were build

2019

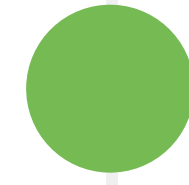
Implemented



End to end Digital Investing Platforms were implemented

2020

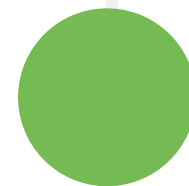
Global



Global Investors experience was enhanced

2021

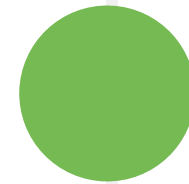
Brand



Awarded as most trusted & promising online financial company by
Silicon India.

2022

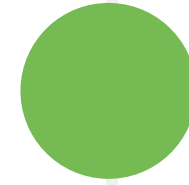
Success



Founder recognised as a Striving success story By ICICI AMC

2022

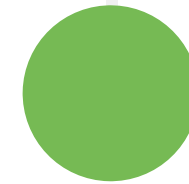
Recognition



Blockchain enabled startup Recognized by Govt. of India

2022

Artificial
Intelligence



Launch of AI based Equity Portfolio Management



Voted as the most promising
online financial company in
India



by Silicon India



**Recent
successes**

A highly experienced leadership team



NIYESH SANGHI

Successful serial entrepreneur & investor since two decades.

Started as Insurance Agent in 2001 & Now Is The Founder Of Most Promising Finserve “Wealth Munshi”.



MANISH KANOJIA

Practice Director at Iridium Interactive Ltd & Kuza Technologies , Manish has 22+ years of rich experience in communication strategies, user experience & elearning solutions in the digital media.



PANKAJ SANCHETI

Former Partner PWC , Founder Kevalin Consultants, Pankaj has more than 20 years of rich experience in the domain of Tax , Accounting & Start Up Advisory.

Join Wealth Munshi for end to end digital solutions &



Build something impactful that you can be proud of

Grow in **knowledge of 10 years** within **just 2 years** of your career.

Become **conceptually solid** by working on some of the wealthiest families

Get **direct mentorship** by Founders with more than 20 years of experience

Get the foundation to **become an entrepreneur** within **2 years**

Grow financially with the right **rewards & recognition**

Wealth Munshi- Success Stories

<https://www.wealthmunshi.com/success-story/>



How SIP Helped Multiply & Build A Substantial Portfolio For Self, Family & HUF Of Government Official (2015)



Pride Of India & Asian Sports Champion Diversified Portfolio From Real Estate To Mutual Funds (2008)



Strategic Investing Of Savings Account Money In Mutual Fund To Generate 30.22% Return -Case Study (2019)

Awards and Recognition



We Have Build Trust With Investors For More Than 2 Decades

- **Genuine, personalised** advice is a great differentiator
- **5Cs** : clear, cohesive, complete concise, concrete
- **Hand-holding through volatility, always**
- **Holistic financial planning, not investment returns**
- **Answers to your financial goals**

**Building
Client Trust**





The best advice I've received from my mentors is focus on accomplishments in early years, not on titles or other rewards. That will follow suit.

Focus on the legacy I can sell. Focus on what I can look back and feel proud of. & I'm here today because I focused on the right things.



Nandan Nilekani

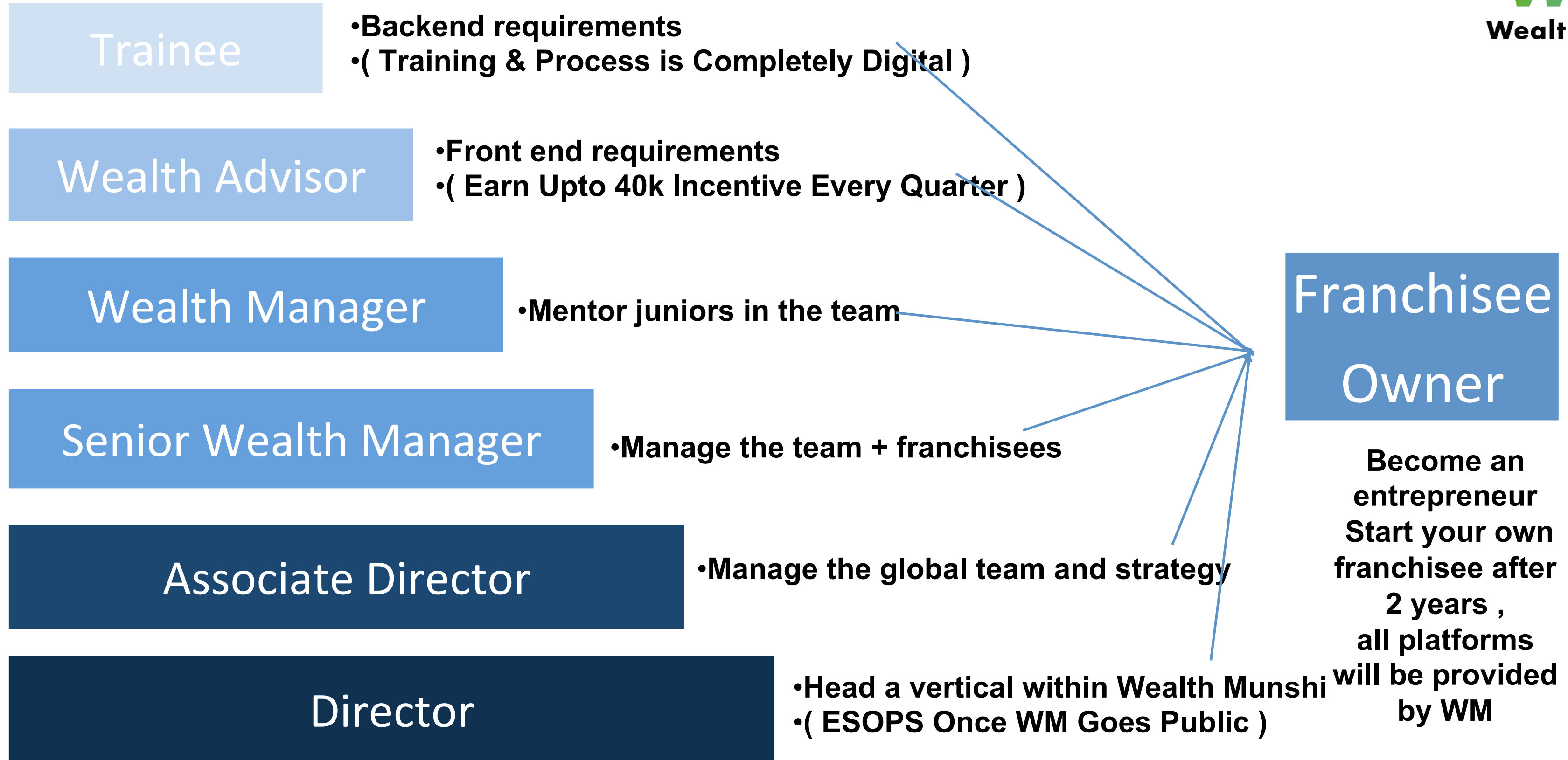
**Grow.
Grow Right.**





How You Can Build Your Career With Wealth Munshi

Growth - Responsibility



Become Our Franchise

Partner & Get 3x ROI



50% reduction in costs

35% increase in sales and leads

100% cashback on your investment

No office space required

No geographical restrictions

Benefits Of a Franchise



1. Get **Royalty Income** Like a Celebrity For Life & Carried Forward to Your family .
2. Sell Once **Get Paid For Life** .
3. Learn **The Tricks of The Trade & Get Trained From Industry Experts** .
4. Work Hard For 2 Years & **Get Overpaid For The Rest of Your Life.**
5. Build **Your Retirement Fund With Your Franchise.**

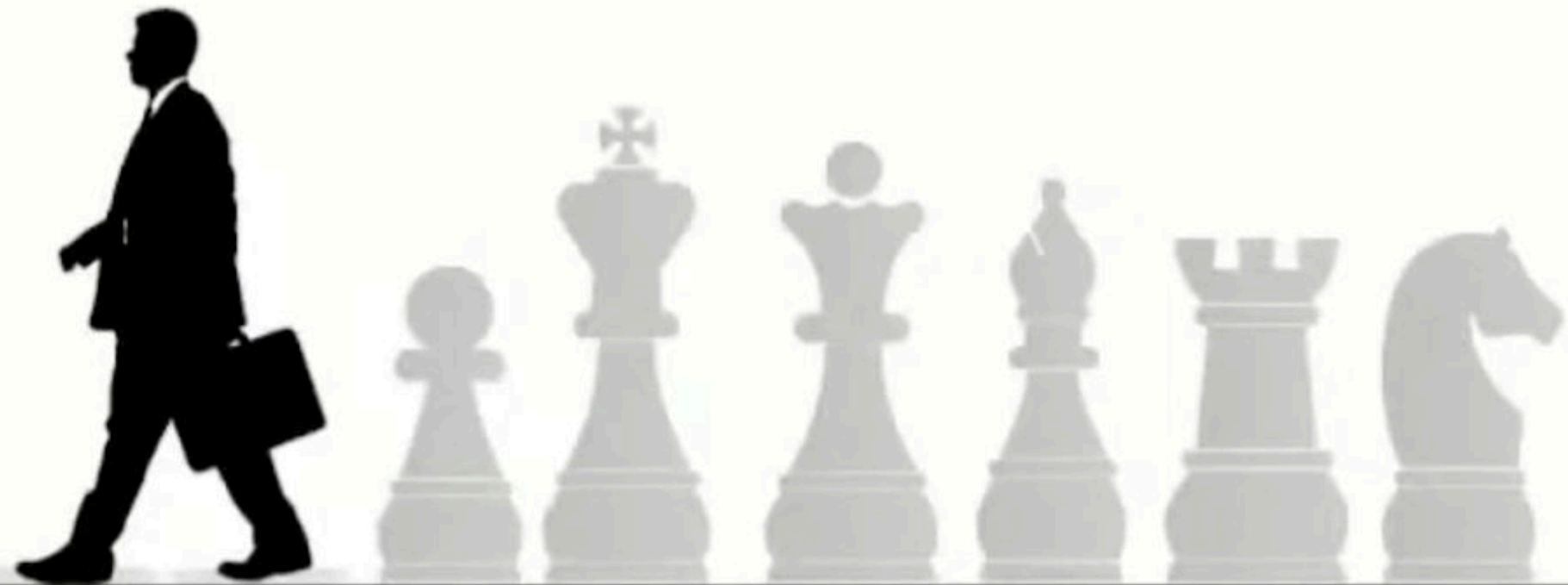
Our Aim is To Make You Successful



Why is Your Success Guaranteed With Wealth Munshi



- Tap Huge investment Market in India
- Freedom from Operational Work
- Get Access to Best researched products
- Build your own brand with Marketing tools
- Stay updated with regular (and relevant) training sessions
- Spend more time with your customers



How Being Completely Digital Helps You Grow Faster



- Distributors benefiting from platforms dedicate an additional **11% of their time to client** investment management and serve a greater number of clients **(44% greater) double their books of business**, and **increase practice revenue/ production by 73%**, compared to their peers that do not have advanced technology integration.
- *Depending on the priorities of the practice and its size, the **increased time** allocated to client acquisition and investment management **enables distributors to deepen the relationship with existing clients** or increase the practice's client and asset base.*



Why Your Productivity With Wealth Munshi is Higher



	AVERAGE DISTRIBUTOR	ELITE DISTRIBUTOR
Client Interaction	16.00%	32.00%
Client Acquisition	10.00%	17.00%
Research & Portfolio Management	24.00%	11.00%
Office Admin & Back Office Management	20.00%	5.00%
Training and Process Setup	10.00%	20.00%



Enabling Environment



FOR MANAGING & DEVELOPING WEALTH BUILDING BUSINESS



Wealth Munshi Has a Strong Standardised Process



- For Back End
- For Wealth Managers
- **For Investors :**
 - Readymade Portfolios Offerings:
 - Dynamic Asset Allocation
 - Fixed Asset Allocation
 - SIP
 - SWP
 - Liquid Portfolios

Unique & Comprehensive Report For Investors



- Personal / Corporate Goal Achievement Programme - Detailed Income & Expense Analysis
 - Cash Flow Management
 - Current Financial Resources - Debt Management
 - Goal Funding Analysis - Life Insurance Analysis - Risk Profiling
 - Asset Allocation
 - Opinion on Structured Investments - Action Plan
- a) Customised **Asset Allocation** b) **Implementation of advise** c) **Online Transaction Platform.**
- Transact Online (No Paperwork required)
- d)Track Your Investments Updated Real time

Challenges We Overcome By Becoming Digital



No Process - No Scalability: From sales to implementation everything is manual & depends on me.

Poor Accountability: Constant supervision required even for routine tasks.

Not Embracing Technology: Technology can either assist you if your work with it or act against you.

No Automation: In a world with driverless cars, why are you doing everything manually ?

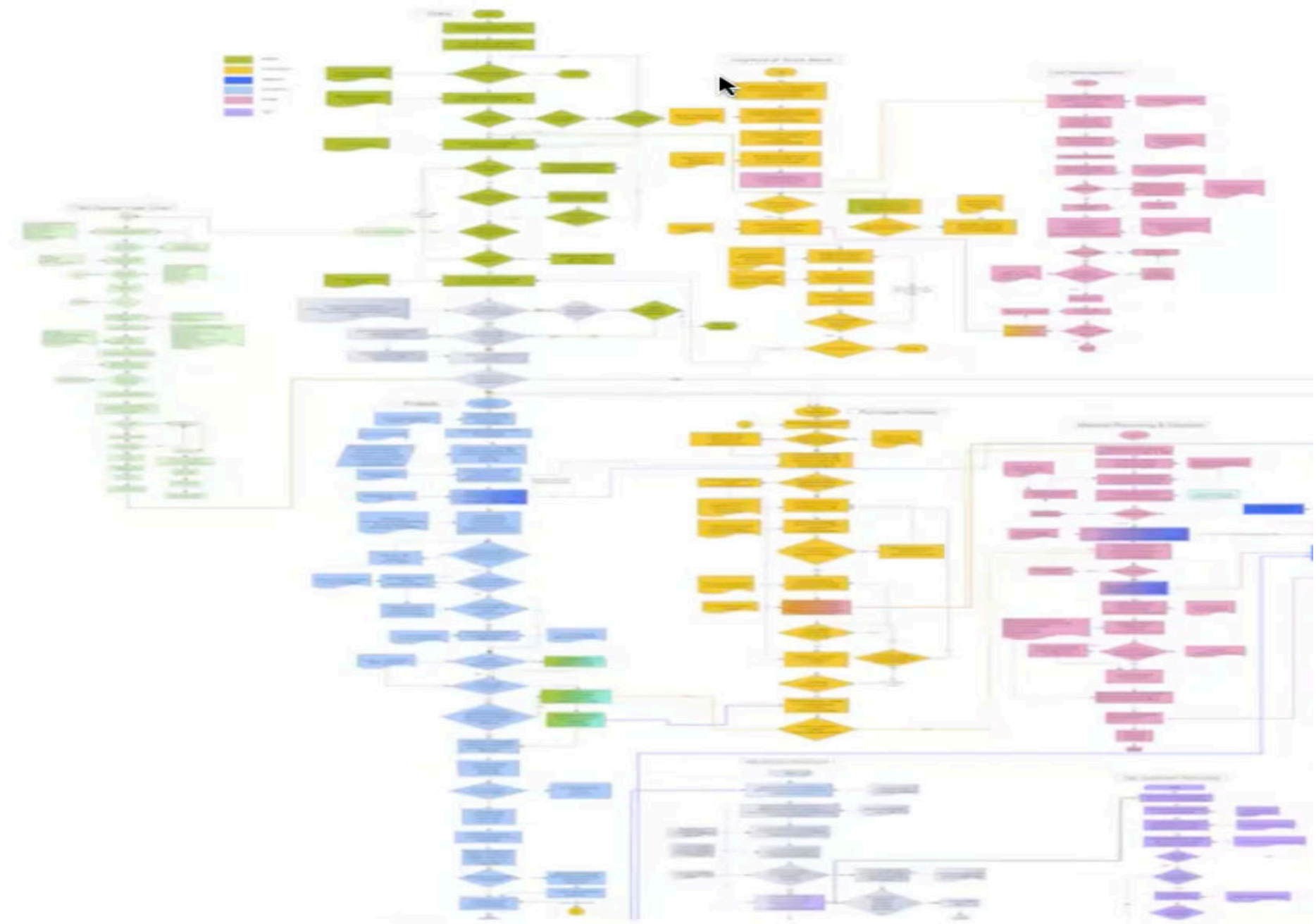
For Smooth Flow of Business Process is Standardised



Mapping Business Processes

**Map all process
separately.**

**Create a combined
Flowchart for all
process to check how
they interconnect.**



Social Obligation



1. Paperless:

Completely Paper Less -Making Sure We Save The Trees &Help Environment

2. Data:

All Data Stored on Cloud

3. Goals:

We help society by Helping Families Achieve Their Financial Goals

4. NRI (Non Resident Indian) / PIO (Person From Indian Origin) / R21 (Returned 2 India) :

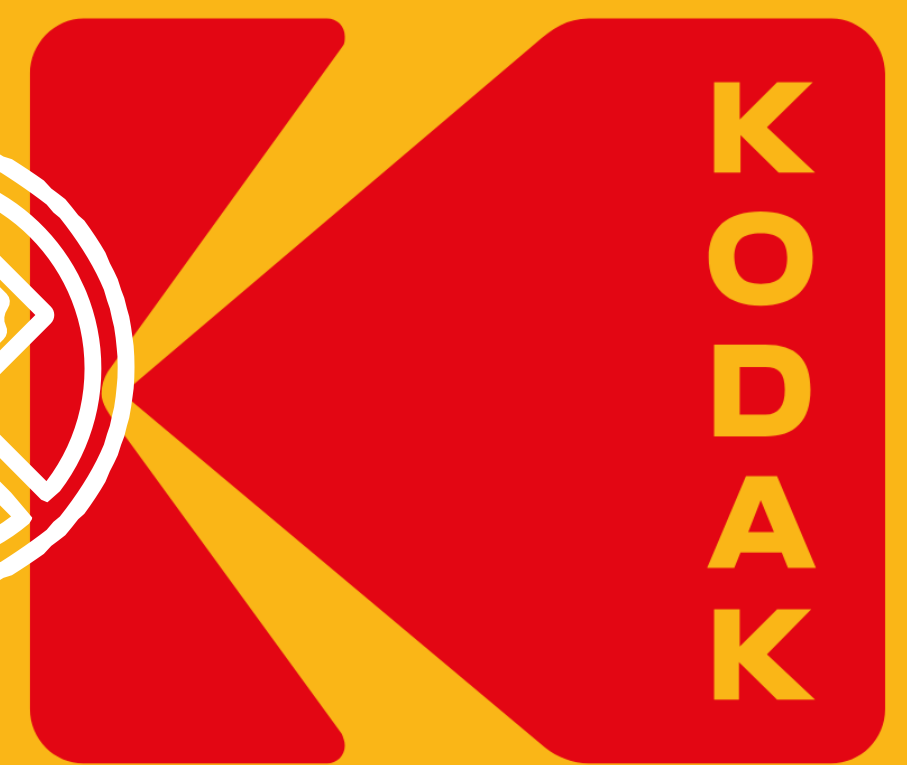
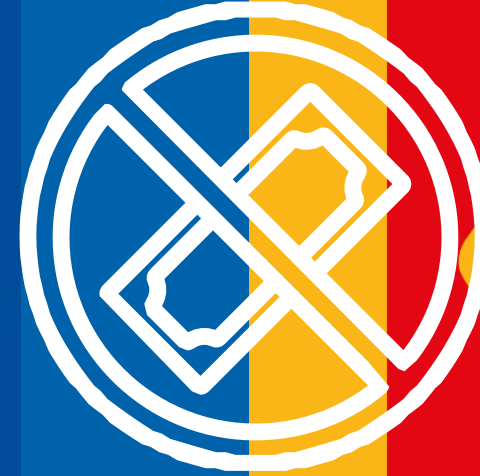
NRI living Living Out of India Get Full Support To Invest in Emerging From The Globe.



How The World Has Changed

Established companies going out of Business

NOKIA



Nokia had 49.3% market share of mobile phone market in 2007.

Was then sold to Microsoft which further sold it to HMD.

Refusing to change : Failed to see how software is taking precedence over hardware. Noika did have the skills to step up with the times.

They did not even show the inclinatoon to work towards it

Kodak invented the digital camera but rejected the whole projects

Was worth \$ 38 Billion

Employed 140000



WealthMunshi

Digital Presence is Seen In Every Aspect of Life



Founding Members of New Tech Savvy Companies & Their Valuation



Youtube

Value \$ 1.65 Billion
Employee 61
Value/ Employee \$ 2700000

Instagram

Value \$ 1 Billion
Employee 13
Value/ Employee \$ 77 million

Whatsapp

Value \$ 19 Billion
Employee 55
Value/ Employee \$ 345 million



Thank You