

# Consultants Review

## 25 Most Promising Financial Consultants - 2017

The Indian financial service industry today has occupied a vital position and is in the state of transition driven by the market shifts, fierce competition and technological advancements. This transition over the two decades has made the industry to re-structure its processes, systems and product line. Influenced by the public & private, non-banking financial institutions and other financial entities has helped the financial sector to come a long way ahead and enhance the country's economic growth.

As the country is today recognised as one of the world's most vibrant capital markets, the competition among the business is also growing rapidly at the same time. Though the competition is multiplying with the entry of SME's and large corporate but at the same time the risk and threat factor, especially of financial nature has also been increasing. To overcome these threats

and help the businesses in the long run, the role of financial consultant comes into account. These financial consultants aims to help the organisations in the highly competitive market by assisting them to identify and mitigate risk, provide rich solutions in all financial related matters on real time assured with reliability & transparency. These consultants not only serve as an advisor for financial requirements but also aim to help the businesses in accomplishing their financial goals, make profitable investment by minimizing their cost and enhance their business growth.

In this edition of Consultants Review, we have listed '25 Most Promising Financial Consultants', who are capable of improving business financial matters and bring value to client's business. The proposed list aims to help the entrepreneurs and corporate leaders to choose the right consulting partner who can help them yield profit and enhance their growth.

### Wealthcare Securities

recognized by *Consultants Review Magazine* as

ConsultantsReview 25 MOST PROMISING  
**FINANCIAL**  
CONSULTANTS - 2017

*The annual listing of 25 Most Promising Financial Consultants represents not only the commitment of listed companies to offer effective financial services, but also recognizes the companies impacting the market place.*

*Nandini*  
Nandini Mukherjee  
Managing Editor

#### Company:

Wealthcare Securities

#### Description:

Customer Oriented Approach firm that offers financial products and services, tax implementation intricacies and others with blend of technological application

#### Key Person:

Mukesh Gupta,  
Managing Director

#### Website:

wealthcareindia.com

## Wealthcare Securities:

### A Professional Platform for Private Wealth Management Services

The Indian financial services industry has undergone the toughest of times and yet it stands as one of the strongest and robust among the world economies. Experiencing a deep impact of the highs and lows, the new face of this industry has evolved itself to a more transparent and flexible system. Over the last few years, the financial market scenario has witnessed a significant broadening and deepening of services with the introduction of several new instruments & products in banking and capital markets space. The sector today has opened up to the new private players who can embrace their best practices blended with advanced technology for offering a polished range of services to its corporate, retail and institutional clients. Noticing this tremendous competition many new and existing players has emerged up in this financial space to lend their expertise through excellent solutions.

One such emerging player in this financial advisory space is Wealthcare Securities Pvt. Ltd. The company is the brainchild of Mukesh Gupta, Chartered accountant & Certified Financial Planner, a veteran in the field of financial planning and Investment advisory space with a rich experience garnered over the years from large wealth advisory firms and banking sectors in the country. Established in 2003 at the time of economic boom, Gupta speaks, "I started my professional career as a wealth management advisor to the clients of the companies where I worked for. At the time of financial boom, I decided to give a miss to my corporate comfortable career and start my own advisory firm that can act as a Chief Financial

Planning outsourced platform." With a team of experienced professionals catering to the wealth management requirements of companies, SME's



Wealthcare Securities constantly strives to be an exemplary 'Financial Advisor' in providing the best advice based on the understanding of cash flows, financial objectives, financial risk acceptance level and others



and other firms with a special focus on the High Net Worth Individuals (HNI), Wealthcare Securities aims to be a highly professionalised platform for private wealth management services. Assuring a high degree of Trust, Personalized Service & Confidentiality, the company offers its services related to financial and wealth management planning starting right from creating a financial plan or a model portfolio to its execution and monitoring.



Mukesh Gupta,  
Managing Director

Additionally, it also recommends its clients with the product that fits and is suitable to them. The product includes Mutual Funds, Investment Trust, Fixed Deposit, Tax free-bond and others differing from clients to clients and also help them in reviewing their portfolio on monthly or quarterly basis. "Set up as a 'Customer Oriented Approach' firm, we try to educate our clients with all the products and services, tax implementation intricacies and other factors that emerge in the day-to-day growing business," he mentions.

#### One Platform – Numerous Solutions

Headquartered in Delhi, Wealthcare Securities constantly strives to be an exemplary 'Financial Advisor' in providing the best advice based on the understanding of cash flows, financial objectives, financial risk acceptance level and others. Being a one stop provider for all financial needs, the company renders its personalised services that adds value to the client's investments. Blending technology with human touch, it strives to be an outsourced platform that is relationship oriented rather than price oriented business.

Started with a zero base, the company today has grown to 24 to 25 percent per annum since inception. Believing that technology has increased their per capita base, Mukesh enthusiastically says, "We are trying to make our strong base through implementation of digital marketing so that we can cater to more number of clients spread all over. We expect to double our growth in the coming three to four years with inclusion of more staff numbers, research persons and involvement of latest technology." CR