

Journey of a *wealth manager*

Careers in wealth management

- ▶ How big is the opportunity?
- ▶ What does it take to get success?
- ▶ What roles exist?
- ▶ What about growth?
- ▶ Is it for me? How do I make the move?

#myjourney

Careers in wealth management

- ▶ early days
- ▶ *stumbling* upon wealth management
- ▶ disillusionment!
- ▶ *unlearning*: creating a wealth management business

#opportunity

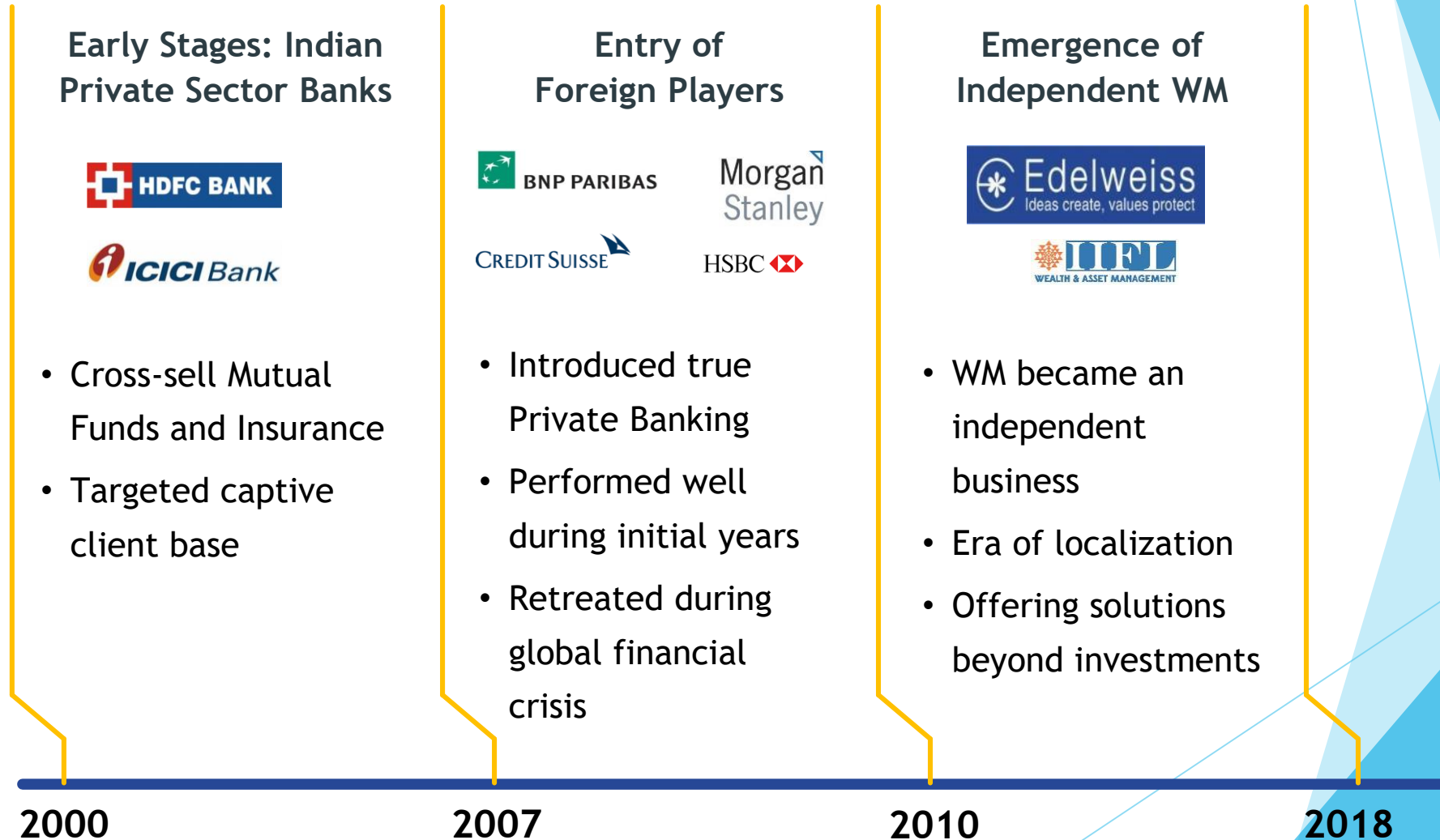
Wealth management is a BIG business!

- ▶ US: Top 3 players' AUA: 40% of GDP; China: Top 2 are 6% of GDP

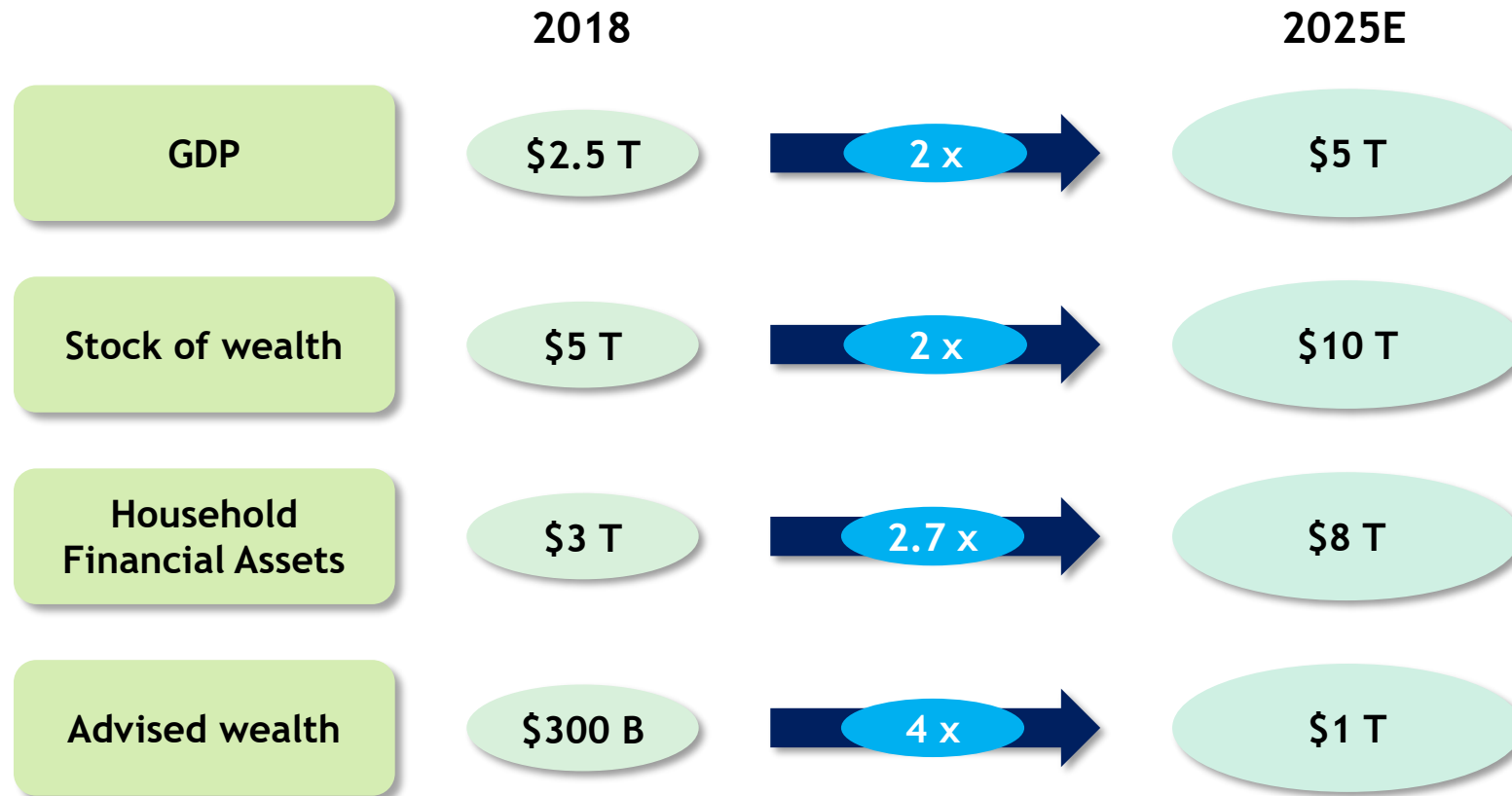
\$ Bn	USA		China	
	Schwab	Morgan Stanley	Citic	Ping An
AUM	3,600	2,500	450	350
WM revenue	10	17	3	2.8
Financial advisor count	4,500	16,000	NA	NA
Market cap	54	70	45	235

Does India offer this
opportunity?

Wealth management has evolved into a *mainstream* industry...



...and is a large and growing opportunity



Demand is *not* a constraint!

we are at an inflection point...

... IT, Banking, Insurance in late 1990s-early 2000s

what's wealth management?

why do we exist?

The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. The shapes are primarily triangles and polygons, creating a dynamic, layered effect. The text is centered in a clean, sans-serif font.

“help our clients spot
opportunities and trends...
protect them from risks.”

#lesson 1:
wealth management is not
only investment
management

#lesson 2: developing competencies

Relationship management

Knowledge of economy, financial markets, asset classes

Products and services

Technology

#lesson 3:empathy!

#lesson 4: what does it take to be a great wealth manager?

Curiosity

Imagination

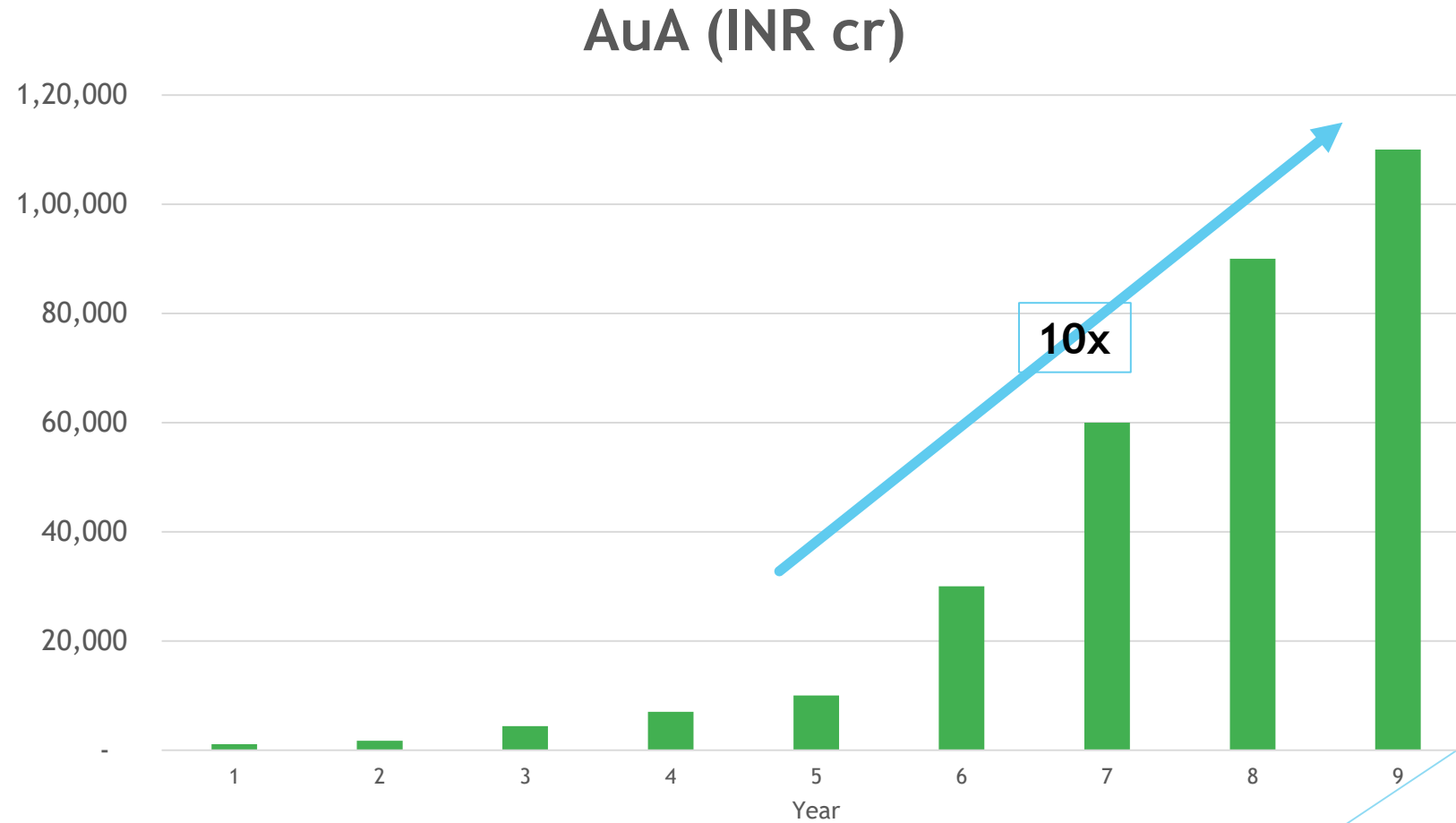
Global perspective

Dealing with volatility

Patience!

growth?

Here's how we've grown over 10 years



welcome to a great future!