

MENTORSHIP GRID

AN INITIATIVE BY CITRUS ADVISORS
IN ASSOCIATION WITH
I-CAN FINANCIAL SOLUTIONS PVT. LTD.



INDIAN WEALTH MANAGEMENT INDUSTRY TODAY

- Highly fragmented with organized players mainly focusing on urban segment
- Evolving regulatory environment:
 - Need to shift from Product selling to Holistic Financial Planning
- Consolidation in the unorganized sector - which comprises of Independent Financial Advisors (IFAs) or small brokers/agents.
- Low awareness of financial products among investors especially in Tier 2 and Tier 3 cities.

- Whole new range of products and services.
Having a wide range will be vital to success
 - Organized players are partnering with specialists to enhance product offerings
- The industry faces a shortage of trained advisors and high rate of employee attrition

“We recommend wealth managers consider the following to succeed in the Indian market:

- Build your brand and focus on over-coming the trust barrier*
- Invest in advisor technology to improve advisor productivity and retention.*
- Evaluate a partnership-based model, coupled with innovative use of technology to increase reach*
- Focus on transparency and compliance, while targeting customers with attractive, segment-focused products.”*

-Cognizant Report (June 2011)

“Wealth Management in India: Challenges & Strategies”

MENTORSHIP GRID

Identify IFAs who possess the following who would like to be Anchors:

Great leadership skills

Passion for their profession

Tremendous experience & knowledge

Desire to share their knowledge with other IFAs and earn satisfactory income for self and peers

WHAT WE WILL OFFER.....



Access to state-of-the-art Technology



Constant interaction to enhance knowledge base



Access to latest tools & tutorials on selling skills



Strong Brand Name



Well Researched Advisory Inputs



Mentors Forum

OUR OBJECTIVE

To raise the respect for financial advice as a service and Financial Advisor as a service provider in the eyes of the investor.

HOW WILL WE ACHIEVE IT?

- Advisor puts the interest of the investor uppermost in any advice
- He enhances the value he delivers to the client
- Acquires knowledge and keeps it updated to be able to guide the client properly
- Adheres to a code of conduct that wins the confidence and respect of all concerned
- Understands that there are no shortcuts to competence - professions which enjoy high degree of respect such as engineering, medicine etc also entail a lot of hard work.

We invite like-minded individuals from various parts of the country to join us in this movement. If you share our vision and have a passion for the profession, we can work together.



CONTACT

sanjay.sinha@citrusadvisors.com

umesh.shukla@icanindia.com

gokul.parekh@icanindia.com

THANK YOU

