

Wealthways WAY TO WEALTH

A century of experience. *One purpose.*

Wealthworld Pathways Private Ltd. is an AMFI-registered Mutual Fund Distributor committed to guiding individuals, families, NRIs, and institutions toward disciplined, long-term wealth creation. We bring 100+ years of combined experience and an unwavering ethos of transparency to every investor relationship.

100+

YEARS COMBINED EXPERIENCE

6

FOUNDING PROFESSIONALS

2019

YEAR ESTABLISHED

24/7

DIGITAL PLATFORM ACCESS

OUR PHILOSOPHY

01

Disciplined investing. *Generational outcomes.*

We believe wealth creation is not an event — it is a continuous, disciplined process. As an AMFI-registered Mutual Fund Distributor, Wealthways connects discerning investors with curated mutual fund solutions aligned to their unique goals, risk temperament, and life stage. Our approach blends the rigour of an institutional firm with the personal attention of a boutique practice.

INTEGRITY

Honest, transparent client relationships — always aligned to your goals, governed at every step by SEBI and AMFI's Code of Conduct.

TRANSPARENCY

Full disclosure of commissions, scheme rationale, and performance — because informed investors make better long-term decisions.

BEHAVIOURAL CLARITY

We guide investors beyond instinct and emotion, helping them stay committed to disciplined SIP strategies through every market cycle.

OPERATIONAL EXCELLENCE

A state-of-the-art digital platform with 24/7 access — institutional-grade infrastructure with boutique-level attention.

VISION & MISSION

02

OUR VISION

To create enduring financial freedom through transparency, disciplined investing, and integrity — for every family we serve.

OUR MISSION

To elevate investor behaviour and guide each client toward purposeful, goal-based mutual fund investing for generations to come.

WHAT WE OFFER

03

Mutual fund solutions *across every life stage*

As an AMFI-registered Mutual Fund Distributor, we facilitate access to a broad spectrum of SEBI-regulated mutual fund schemes — each matched to your goals, risk profile, and time horizon.

01**Goal-based investing**

SIP-driven, goal-oriented mutual fund selection for education, retirement, home

02**NRI mutual fund access**

Dedicated support for non-resident investors navigating KYC, FATCA

03**UHNI & family facilitation**

Curated scheme selection for ultra-high-net-worth families across equity, debt, hybrid, and fund-of-fund categories.

purchase, and long-term wealth creation.

compliance, and rupee-denominated investments.

04

Retirement & long-term SIPs

Structured, long-horizon systematic investment facilitation — harnessing compounding for durable retirement outcomes.

05

Corporate surplus deployment

Facilitating mutual fund solutions for corporates and start-ups seeking efficient deployment of treasury capital.

06

Investor education & guidance

Helping investors understand risk, scheme categories, costs, and market cycles to make confident, informed decisions.

OUR PRINCIPALS

04

100+ years of combined *experience at your service*

Our founding team unites professionals from capital markets, banking, insurance, corporate finance, and mutual fund distribution — guided by a single purpose: serving India's investors with integrity, clarity, and depth.

FOUNDER & CHIEF EXECUTIVE OFFICER



Rishi Jiwan Gupta, CFP®

FOUNDER & CEO · CERTIFIED FINANCIAL PLANNER

Architecting disciplined capital. Shaping wealth that endures across generations.

Rishi Jiwan Gupta is the Founder & Chief Executive Officer of Wealthyworld Pathways Private Ltd. As a Certified Financial Planner (CFP®) with over two decades of experience across capital markets, private banking, and institutional finance, he brings a rare blend of institution-grade precision and boutique-level discretion to every client engagement.

His philosophy centres on disciplined allocation, rigorous risk awareness, and behavioural clarity — ensuring that wealth compounds with stability and permanence across market cycles. He is building a future-ready mutual fund distribution platform that integrates global market intelligence, data-led insights, and technology-enabled execution to serve India's most discerning investors.

20+

YEARS IN CAPITAL MARKETS



CERTIFIED FINANCIAL PLANNER



FAMILY OFFICE FOCUS

FOUNDER

SB CA CFP® Sunil Kumar Bahri
FOUNDER · CA, CFP®

25+ YEARS · WEALTH & ASSET MANAGEMENT

Where wealth meets vision — guiding UHNIs & NRIs toward structured, generational prosperity.

A Chartered Accountant and Certified Financial Planner with 25+ years across wealth management, asset distribution, and strategic planning. His practice facilitates mutual fund solutions across UHNI and NRI segments, encompassing equity, debt, hybrid, PMS, and AIF categories. Renowned for translating complex financial decisions into clarity, he has guided thousands of families toward long-term wealth creation and capital preservation.

FOUNDER & CHIEF FINANCIAL OFFICER

MG Ms. Meenakshi Gupta
FOUNDER & CFO · M.COM

22+ YEARS · CORPORATE FINANCE & GOVERNANCE

Structuring the firm's financial architecture with discipline, foresight, and accountability.

A postgraduate in Commerce (M.Com) with 22+ years across financial management, corporate governance, and strategic capital structuring. She ensures the firm's financial foundation remains resilient, transparent, and aligned to its long-term purpose. Known for clarity in decision-making and disciplined stewardship, she safeguards the operational and financial integrity of Wealthways at every level.

HEAD OF OPERATIONS

AJ Ms. Anjali

HEAD OF OPERATIONS · 15+ YEARS · 5+ YEARS WITH THE FIRM

The operational backbone of Wealthways — delivering seamless execution and elevated client experience at every touchpoint.

With over 15 years of expertise across operations management, client servicing, and backend execution, Ms. Anjali has been instrumental in architecting operational frameworks that deliver precision, reliability, and client satisfaction at scale. She aligns operational workflows with client-centric outcomes — ensuring every investor interaction reflects the firm's ethos of trust, discipline, and institutional-grade service. Her leadership is the cornerstone of Wealthways' ability to deliver boutique attentiveness at institutional scale.

CO-FOUNDER & DIRECTOR

RS Ramandeep Singh, CFP®
CO-FOUNDER & DIRECTOR · CFP®

22+ YEARS · MUTUAL FUND DISTRIBUTION

Designing wealth strategies that endure — across generations and market cycles.

With 22+ years in mutual fund distribution, wealth management, and real estate strategy, Ramandeep brings entrepreneurial vision and disciplined execution to every engagement. He specialises in goal-based mutual fund facilitation, retirement-oriented SIP structures, and intergenerational wealth planning — ensuring investor capital remains aligned with purpose, resilience, and long-term sustainability.

DIRECTOR

VK Vivek Kapoor
DIRECTOR · LLB, MBA

20+ YEARS · PRIVATE BANKING & INSURANCE

Integrating risk, insurance, and mutual fund distribution into holistic client outcomes.

A Law Graduate and MBA (Panjab University) with credentials from the Insurance Institute of India, currently pursuing CFP and FPSB Board USA. With 20+ years spanning private banking and corporate insurance, Vivek brings a rare intersection of legal, financial, and risk perspectives — facilitating mutual fund and insurance-linked solutions that protect and grow client wealth across generations.

BEGIN YOUR JOURNEY

~~A team that has seen~~ *every market cycle*

~~We engage a select number of investors to ensure every relationship receives the depth of attention it deserves. We invite you to connect with us for a confidential, no-obligation conversation about your mutual fund investment goals.~~

MUTUAL FUND DISTRIBUTION

SIP & GOAL-BASED INVESTING

NRI INVESTMENTS

UHNI FACILITATION

RETIREMENT PLANNING

CORPORATE DEPLOYMENT

INVESTOR EDUCATION

Regulatory disclosure: Wealthyworld Pathways Private Ltd. is an AMFI-registered Mutual Fund Distributor (ARN holder). Mutual fund investments are subject to market risks. Please read all scheme-related documents carefully before investing. Past performance is not indicative of future results. We do not provide investment advice, financial planning, or act as a SEBI-registered Investment Adviser. We are not liable for any investment decision made by clients solely on the basis of information shared here.

Wealthyworld Pathways Private Ltd.

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