

Meet India's longest-standing financial advisors (excerpt)

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Here are some of India's longest-standing financial advisors



This list of RIAs is meant to serve as a good starting point in your hunt for a suitable financial advisor

It was a decade ago - in January 2013, when the securities market regulator SEBI first introduced its Registered Investment Adviser (RIA) regulations. To mark this significant development, Mint reached out to some of the oldest financial advisors to understand their investment philosophy and their professional journey over the years. Many of them were providing financial advice even prior to 2013. Once the RIA regulations were introduced, they got themselves registered under them.

Here's a little about all the RIAs that were featured in Mint as part of this special series. This list of RIAs is meant to serve as a good starting point in your hunt for a suitable financial advisor, and is not to be construed as a recommendation in any form. Use the list and the details on each of the financial advisors to understand their approach to financial advice, what to expect and what not from a financial advisor, and the challenges that they have faced at the client level. Interestingly, many advisors reveal it's tough to convince all clients to act upon the advice offered to them even when it's in their best interest.

Here's hoping this list helps you take the next big step in your financial journey. Happy reading!
Meet India's longest-standing financial advisors

Vishal Dhawan, founder, Plan Ahead Wealth Advisors

Assets under advice: Rs. 1,000 crore. Client size: 300-350 families.

Location: Mumbai. Start of practice: 2003

When it comes to financial advice, the one thing that most people would appreciate is transparency. [Vishal Dhawan](#) is doing his bit by listing out their (he and his wife's) personal portfolios under the disclosure section of their website. Among his proudest moments as a financial advisor are the ones where he helped his clients achieve goals that they aspired for but weren't sure they could afford.