

Why do you like your profession?

Published By Muzammil Bagdadi on: Feb 14, 2024

Mumbai MFD Gajendra Kothari and RIA Vishal Dhawan will share their take on what they like most about their profession.

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Café mutual Ideas Fest 2024 (CIF 2024) 2024 to host MFD Gajendra Kothari, Etica Wealth, Mumbai and RIA Vishal Dhawan, Plan Ahead Wealth Advisors, Mumbai who will take us through what they like most about their profession.

Let us take a sneak peek into the session:

Gajendra Kothari- Etica Wealth

Power of lifelong learning

The most valuable resource we have in our field is lifelong learning. Our ability to assist clients grows as we gain more knowledge. Because our clients rely on our knowledge, MFDs must be updated daily. Learning about various aspects like the market, politics and human behaviour is key. In this field, learning never stops; it's a continuous journey.

Vishal Dhawan- Plan Ahead Wealth Advisors

Balancing family and business goals

Investors often juggle their family life and business ambitions. Having a complete view of an investor's life, we can help them see how much time they need for family and how much to grow a business to get financially stable. If they want, they can slow down too. Our advice can make a big difference in their life plans.