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**H**e started dealing in the stock market since his college days and liked the idea of managing portfolios for his friends. After his MBA, he joined a broking company which was into mobilising fixed deposits and bonds those days. "In 1997, I opened my own financial services company. It has been a memorable journey. This is a competitive industry that demands professionals to be diligent, focused and hard-working. I believe my personal traits and ambitions made me a perfect fit," shares Sajal Roy, founder, Anjali Investment & Consultants. Today, the company stands on the pillars of customer focus, integrity, passion and innovation.

# PLANNING IT RIGHT



NO CHALLENGE IN INVESTING IS EVER TOO GREAT AND WITH AMPLE RESEARCH, PLANNING AND A STRONG FINANCIAL PLAN, IT CAN BE MANAGED, ASSURES **SAJAL ROY, FOUNDER, ANJALI INVESTMENT & CONSULTANTS**

"We were also awarded the 'Most Promising Brand for Wealth Management Services in West Bengal for the Year 2016' in Leaders Awards for Business Excellence in India," shares Roy.

## THE JOURNEY

Founded 22 years ago as a small unit, it was started with the vision of providing customers the best. "Focus on customer-first attitude, ethical and transparent business practices, respect for professionalism, research-based value investing and implementation of cutting-edge technology has enabled us to blossom into a leader in financial services in eastern India," beams Roy.

## KEY CHALLENGES

Being a financial advisor is challenging in itself. "It is important to continuously grow your business and expand your capabilities — and it's not an easy battle. You face new self-serve technologies, competition from big firms and a volatile market that can cause uneasy feelings among potential clients," says Roy. The most common challenges are managing client expectations, managing information, finding a unique value proposition and increasing revenue and profits. Investing is not easy. "While the benefits are plentiful for those who can approach investing with a thorough, strategic plan, there are challenges that even the most prepared investor must seek to overcome. Yet no challenge is ever too great and with ample research, planning and a strong financial plan, the challenges of investing can be managed without being feared," assures Roy.

AS A PIONEER OF MUTUAL FUND INVESTMENTS IN KOLKATA, HE FEELS EVEN THE MOST PREPARED INVESTOR MUST BE READY TO TAKE ON CHALLENGES IN THE COURSE OF HIS FINANCIAL JOURNEY

## STRIKING A BALANCE

His family includes his wife, daughter and son. "They are the roots of my existence," asserts Roy. He thinks the first step to achieving a better work-life balance is to think about the current demands of professional and personal life.

"Then only will you be able to establish your rules that allow you to strike a balance. Creating realistic boundaries between work and non-work items, prioritising tasks and learning to say 'no' sometimes help," he adds.

## FUTURE PLANS

Growth of an organisation is not just about the organisation anymore. The best firms grow because of the success of their clients. "Our future plan is to help our clients make smart investment and financial decisions through professional relationships based on uncompromising integrity, trust and personalised service. We accomplish this mission by offering holistic, comprehensive advisory services to help clients prioritise and attain their life goals," states Roy.

## ACHIEVEMENTS GALORE

Anjali Investment & Consultants has won 'CNBC best Financial Advisor Award for Megacity East for three consecutive years — 2013-14, 2014-15 and 2015-16'.

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