RIA India Talks: Lessons from Abroad - How Can RIAs Further Develop Their Practices?

Stuart Magrath

Senior Director
Channel Management, Australia and New Zealand
S&P Dow Jones Indices

Stuart Magrath is Senior Director, Channel Management, Australia and New Zealand at S&P Dow Jones Indices. He focuses on the current and future financial aspects of the accumulation and drawdown phases of the retirement community of both countries. As part of Stuart's responsibilities, he services the needs of different influencers including financial advisers, accountants, and self-managed superannuation fund members.

Stuart's career has encompassed roles in marketing, e-commerce, and customer experience design in addition to direct, and intermediated, distribution experience across a diverse range of industries including telecommunications, financial services, media, and print publishing.

Stuart started his career with KPMG in their Tax Advisory business in Sydney followed by a number of roles in publishing, both traditional and online, including with the Sydney Futures Exchange prior to its merger with the ASX.

In 2001, Stuart made the move into retail financial services, initially with MLC, part of the National Australia Bank Group, followed by roles with ING Australia (now OnePath), part of the ANZ Banking Group, AMP, Australia's largest retail superannuation provider, and most recently with Suncorp Group, leading the Superannuation Distribution function through Suncorp Bank branches, as well as self-employed and aligned financial advisers. Additionally, he held relationship responsibility for corporate superannuation plans.

Stuart is a graduate of the University of NSW, Sydney, with bachelor's degrees in both commerce (accounting) and law. Stuart is also a graduate of the Australian Institute of Company Directors.

Renu Maheshwari

SEBI Registered Investment Adviser
Finscholarz Wealth Managers LLP

First individual SEBI Registered Investment Adviser in Tamilnadu and she practices Client Centric, Holistic, Commission Free, Financial Planning and Investment Management. An MBA (Fin), CFP, CPFA and CFA-1, Renu Maheshwari Co-founded Finscholarz Wealth Managers LLP to create a unique 'Full-Service RIA Office' (providing financial planning, investment, tax advice and estate planning services) that works distinctively on 'Investor Side'. Her unique conflict free services fetched 'Best Personal Financial Advisor Award 2016 – India' by APAC Insider. Best Investment Advisor in The Country-' 'Outlook Money'. She was also felicitated with 'Eminent Woman Achiever' award by Rajalakshmi Group of Institutes.

She pioneered 'WoW' (Women Only Workshop on Personal Finance) and conducted regular monthly sessions at IIT Alumni Industry Interaction Center in Chennai for more than 3 years. Committed to women's financial independence, Finscholarz has conducted research on 'Economic Centeredness of Women' along with FlexiCareers to study women's attitude towards investment management. Finscholarz' Financial Planning and Portfolio Management Certificate Courses at Stella Maris College.

As a Founder Director of ARIA (Association of Registered Investment Advisors, India; A Section Eight Company) www.Aria.org.in), she is encouraging and supporting other Advisors to move towards ‘Client Side’. She has been writing on the topics related to personal finance since 2013, she now writes regularly for Bloomberg Quint and official publication of FPSB (Financial Planning Standards Board, India) – Financial Planning Journal. Her expert opinion and analysis are regularly featured by Outlook Money, Business Standard, LiveMint, ET Wealth, and Financial Express.