

Theja Mohan MS is currently a startup entrepreneur in the Wealth Tech space where he recently founded a company by name **Wise Money** along with his spouse Shraddha S Shetty. He has an Industry experience of 17+ years. His last corporate assignment was with Kotak Mahindra bank till end of 2022. He was working as Vice President & National Product Manager – Investments @ Mumbai Corporate Office managing the Kotak Bank's entire Retail Mass Affluent segment AUM of INR 15000 cr as a Product Manager. The AUM included Mutual Funds & Alternate Investments. Prior to this role he has worked in the Investment Research Team of Kotak Mahindra Bank in Mumbai as a part of the Central Product Team & as a Senior Portfolio Advisor. Being the first Senior Portfolio Advisor of ING Vysya Bank in Bangalore Corporate Office, he was instrumental in building a large team of Portfolio Advisors in ING Vysya Bank in 2013-2014. He also has vast sales experience having worked in ING Vysya Bank, HSBC & ICICI Bank in the roles of Area Head-Wealth Management, Senior Financial Planning Manager & Private Banking RM. He has done his PGDBM from SDM-IMD, Mysore and has completed CAIIB. He was selected in the Top 100 Employees of Kotak Mahindra Bank in the year 2019-20 under Young Leaders Council to be groomed for Senior Roles in the Bank.