



OAK WHITE | PARTNERS
Growing With You

COMPANY PROFILE

www.oakwhite.in



Welcome to OAK WHITE

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About OAK WHITE..

We are an Investment enablement firm simplifying financial solutions for our clients

Our rich experience, aligned business model and chosen network of strategic alliances ensure you and your family get the best in class investment experience . Access to bespoke opportunities interwoven carefully with prudence and wisdom, inevitably culminates in bringing the much appreciated efficiency in growing your wealth for the generations to come.

Creating abundance and nurturing peace in all your financial pursuits...
Since 2013..



Our Services..

- Wealth Protection and Management
- Wealth Structuring, Ring-Fencing and Transition
- Family Financial Planning and Budgeting
- Passive Income Planning
- Investment Tax-optimisation
- Corporate Treasury management solutions
- Coaching on Inheritance Management
- Investment Enablement Services

For Client testimonials, visit our website
www.oakwhite.in





Philosophy

Our company logo is inspired from the time-tested yin-yang philosophy in Taoism.

The philosophical principle of Yin and Yang evolved from the fact that all things in the universe exist as inseparable and contradictory opposites.

Wealth management as a process from its core up till the surface embraces co-existence of several such contradictory yet complementary forces like

Uncertainty and Opportunity
Greed and Fear
Trust and Skepticism
Convention and Innovation

Vision

To enable a simplified and profitable experience on money matters

Values

Trustworthiness

Optimism

Prudence

Approach

- Anti-goal approach - Consistently avoiding detrimental scenarios
- Avoiding herd mentality
- Overlooking “dramatic headlines” of financial journalism
- Preferring optimization over maximization
- Regular Reviews
- Striking a fine balance between active and passive management

Leadership

Shriram is a wealth manager by choice and a qualified CFP professional.

Prior to conceiving Oakwhite in the year 2013, he spent his formative years with global financial institutions like Citigroup, Standard Chartered, ABN AMRO and multi family offices like Metis MFO. Apart from providing personal financial solutions, he also consults for early and mid-sized ventures on their capital structuring and private capital requirements.

An active Rotarian, a regular speaker, organiser and moderator of various events and forums of professional and cultural interests. His idea and vision of sustainably 'giving back' to the society would be through enabling growth and supporting micro and small 'for profit' business enterprises and providing access to skill building for the deserving underprivileged section of the society . He is happily married and a father of two school going children.



Shriram Ananth

- Responsible
- Committed
- Qualified
- Trusted
- Available
- Knowledgeable

Our Ecosystem



Uppili
Research



Uday
Taxation



Vivek
Legal



Vipin
Private Investments

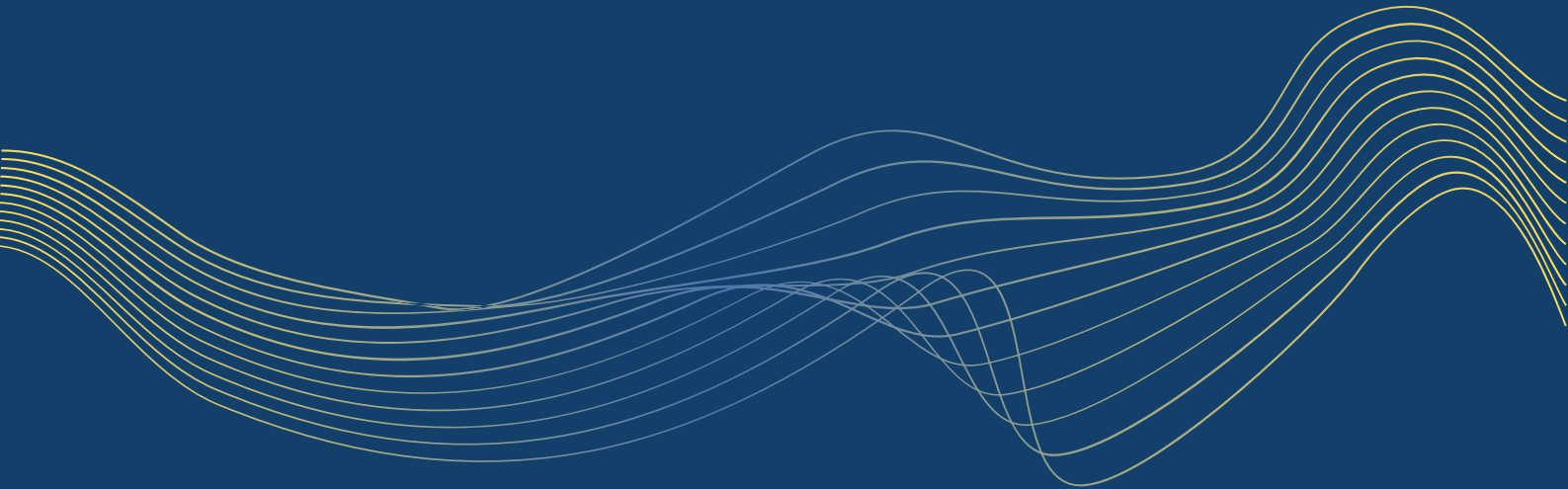
Our Mentors



Mr. Muthuraman
Ex- Director- Ratings @ CRISIL
Co-Founder
Riverbridge Investment Advisors



Mr. SN Balasubramaniam
Ex- CEO- ACCL- Ashok leyland group
District Chair
Rotary International District 3232



'When money realizes that it is in good hands, it wants to
stay and multiply in those hands'

IDOWU KOYENIKAN

www.oakwhite.in

We await to serve you..



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