THE NEXT BIG THING

- Concept by
MR. HITESH MALI

Home For Growth Seekers


Know The Difference
TRAINING
VS
STRATEGY

Are your prospects and leads not quite engaged?

Aspire to execute management in an efficient manner?

In need of excel layouts and personalized branding?

Wish to convert your prospects into clients?

Hard to connect with your investors during hard times?

Are you facing problems with your staff in the office?

Are you not able to follow a process driven approach?

In need of legal and compliance related help?

In need to have presentations to encourage investors?

Have you ever enanged in one to one meeting for business growth?

Are you confused about what you are going to do next?

Are you constantly worrying about AUM & Revenue growth?

THE NEXT BIG THING

Online Training

August 2018 is not merely the date of inception of The Next big Thing, but also the creation of a strong foundation laid on which millions of dreams have come true.

This business development programme has offered more than just imparting knowledge and guidance to grow your business. Business development training; client engagement, client acquisition, employee relations, dealing with different market situations are all the elements niched within The Next Big Thing.

We are one of the few in the industry who cover each and every aspect of investing and finance and provide you solutions for same. If you wish to lead not just a successful but also a happy life, be a part of The Next Big Thing Family.

About

HITESH MALI

Strategic Business Consultant | Founder, equitywala.com

Mr. Hitesh Mali is a prolific finance mentor & a strategic business consultant with an experience of 24 years in the field of finance and investing. Having designed various programs around investing and financing, he has consulted and advised young individuals, helping them shape their careers.

26
years of experience

2,50,000+
Investors trained

130+
cities covered

2500+
Seminars conducted

253+
webinars conducted

50,000+
Mutual Fund Distributors Trained

Designer & Founder of Next Big Thing Program

OBJECTIVE

सुख - शांति - समृद्धि

Beginner

anyone who wish to expand their business horizon and deal with real life challenges of client acquisition & retention, understanding client psychology. This program guides you through all these aspects and introduce you to the ways to solve these doubts.

Intermediate

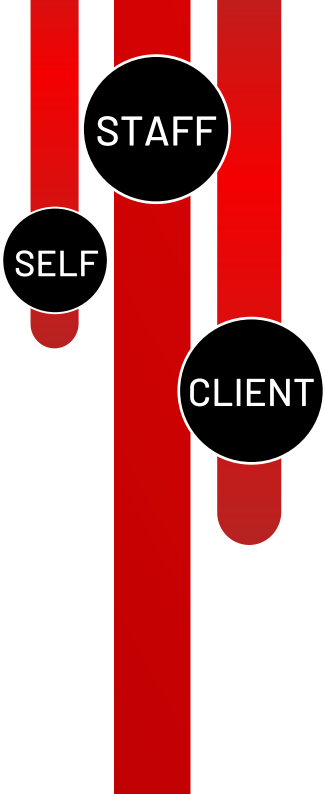
you are in the growing phase. We will help accelerate your growth by working on all the parameters that will help you not just acquire clients but focus on retaining them. You may have a system setup in place. You need a personal set up with regards to business development.

Advanced

Your system and structural framework in place, all you need to do focus on the nuances of business. We help recognize the details that you may need to grow your business. We focus on 360 degree business development by providing a holistic solution to AUM Growth, Client Servicing, Process Driven Approach & Staffing Solutions.

Who Should Join This?

- Independent Financial Advisors (IFA)
- Mutual Fund Distributors
- Certified Financial Planner (CFP)
- Insurance Agent
- Registered Investment Advisor (RIA)
- Wealth Manager
- Sub-Broker



1 PROGRAM | 3 BENEFITS

Our focus will be on:

SELF DEVELOPMENT:

The most fulfilling path to success and personal fulfillment comes through the pursuit of your own self-development. Making a commitment to your own development is the first step on the path to living your personal legend.

- Strategy Formulation
- Product Knowledge
- Market & Client Behavior
- Importance of Book Reading
- Learnings from our Surroundings

CLIENT DEVELOPMENT:

Client development is about taking clients on a journey by giving them the best of experience. Client is the center of our business, we need to understand the personality, needs & problems of the client & give according solutions to him. To shape client's journey we need to do the following things

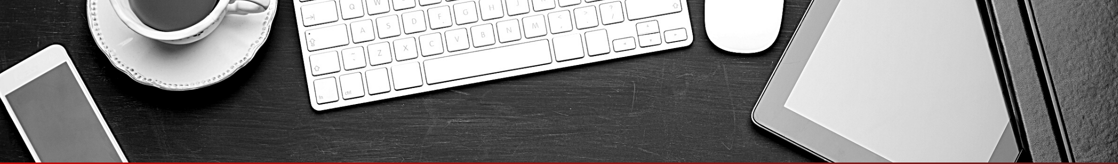
- Client Acquisition
- Client Engagement
- Client Retention
- Client Webinar Trainings

STAFF DEVELOPMENT:

Employee development is a long-term initiative, but it also leads to short-term benefits like increased loyalty and improved performance and engagement. When people are given the tools to do their jobs well and training to advance in their careers, they feel supported and happy.

- Sales Training
- Marketing & Branding
- Understanding Tool Kit
- Time management & Process Driven Approach
- How to be Efficient & Effective at Work Place

If you aren't LEARNING then you aren't LIVING.



Program Coverage

LIVE SESSIONS DELIVERY

- 12 Fixed Online Classroom Training of IFAs
- 12+ Market Behavior Training for Investors
- 6+ Well Designed Course for Staff

CONTENT DELIVERY

- 12+ Thematic Client Presentations
- Client Acquisition, Retention & engagement Strategies
- 10+ Tools, Templates & Calculators

TIME & SUPPORT DELIVERY

- 12 Months (365 days with 52 hours training)
- 1 RM allotment for Execution of Strategies
- Quarterly Review Meeting with RM or Program Coach*

**depends on requirements & performance*

COURSE CURRICULUM

Sessions by the brain behind this program,

MR. HITESH MALI

- **Concept of Business Planning**
- **Investment Vehicles & Strategies**
- **Sales Strategies** – Client Acquisition, Engagement & Retention
- **Regulations and Business Position**
- **Risk Management Business/Investment**
- **New Marketing Strategies (Traditional + Digital)**
- **Office Management & Clients management**
- **Knowledge & Information**
- **Normal marketing Vs Emotional Marketing**
- **Technology & Tools**
- **Presentation Skills & Brand Building**
- **Business Process and Performance**

*All the sessions are subjective to the market scenario & availability of the trainer. We hold all rights to replace or cancel the subjects mentioned above.

COURSE CURRICULUM

Sessions by the team behind this program, empowered by Connection

TEAM NBT

- Basics of Making PPT & Images
- Basics of Excel Tools
- Importance of Communication
- Process Driven Approach
- Interviewing Skills
- Time Management
- Marketing Tactics
- How to Celebrate every event
- Digital Marketing
- How to manage?
- Google Tools
- Mail Etiquette

*All the sessions are subjective to the market scenario & availability of the trainer. We hold all rights to replace or cancel the subjects mentioned above.

COURSE CURRICULUM

Sessions by the guests* invited,

NBT SPECIALS

- Yoga & Fitness
- Dietician & Nutritionist
- Image Consultancy & Personality Development
- HR Consultant
- Fund Manager Talks
- Software Training
- Case Study from NBT Partner
- Importance of Women Advisor
- Taxation

*All the sessions are subjective to the market scenario & availability of the guest speaker. We hold all rights to replace or cancel the subjects mentioned above.

NBT OFFERINGS

- 1 to 1 webinar meeting
- Conference Call
- Staff Training
- Business Kit & Sales Tools
- Marketing Solutions
- Month base theme

- 12+ Product Presentations
- Client Training
- Budgeting & Accounting
- Google Form Training
- Digital Profile
- Team Support & Webinar

- Product Knowledge & Product Basket
- Sales Training
- How to host a client event?
- Email Marketing
- Digital Marketing

PACKAGE OF BENEFITS

the next big thing

The Next Big Thing was initiated with sole purpose of educating and motivating financial entrepreneurs and every person who aspires to invest and earn. We tend to amplify the nuances of investing that one might miss while searching for success.

NBT Specials

Experience the experts

We are successfully associated with a pool of talented and intellectual individuals who are proficient in their respective fields and expertise in different segments of the market. To give you in- depth analysis and first hand data, we conduct sessions with these people. Witness and learn from the best of the industry in NBT Specials.

NBT WISH WEALTH WISDOM

Build relationships with your clients and prospects

Wish Wealth Wisdom is an initiative to educate investors (the clients and prospects of NBT Partners) and acquaint them to the various aspects of investment opportunity in India and providing substantive evidence on the importance of the same. The programme is about understanding your Wish, paving a path of optimally utilising your Wealth, with the help of the Wisdom and create Wealth with the insight provided by us.

NBT Unplugged

A club for all are associates of yesterday, today and tomorrow

We believe in building long lasting relations. We firmly stand for the growth of all. It does not matter how long you have been associated with us, what matters is the quality of our bond.
Be a part of NBT Unplugged and never lose touch, for an NBTian always an NBTian.

NBT extra

Additional Exercises, Additional Knowledge

An extra dose of learning, knowledge sessions, client training, employee engagement. The energy that flows through NBT is not enough and we often hear you all wanting more. Get a little more with NBT Extra.

NBT SHOTS

Shots of surprise to boost your energy, anytime and anywhere

A quick snapshot to energise and rejuvenate you. This is an interesting element where you will get a surprise interaction from Mr. Hitesh Mali. These are quick sessions that will replenish your enthusiasm, recharge you to run the race and remind you of your aim.

NBT TALKS

India's largest talk show of financial professionals

NBT Talks is an annual meet of the financial professionals. It is a vision for India Growth Story for coming years.It is an interesting element being introduced with the sole purpose of educating and motivating financial entrepreneurs and every person who aspires to invest and earn, through real life case studies, where learned people with personal experience in the world of investing will share their journey and impart their learnings which are of great value.

NBT जोश

Team, Tactics and Techniques.... Learn from the team

The strength of the fist is more than a finger. Your team is your powerful fist, which when needed can blow a punch and also become a helping hand. Get exciting insights on various aspects of the market and its related topics from the dynamic team of Equitywala.com

01
PLAN & ASSOCIATE

02
ENROLLMENT

03
APPLICATION LOGIN

04
SESSION STARTS

05
EXECUTION & REVIEWS

THE NEXT BIG THING

Online Training Process

A guide to a Sucessful Business

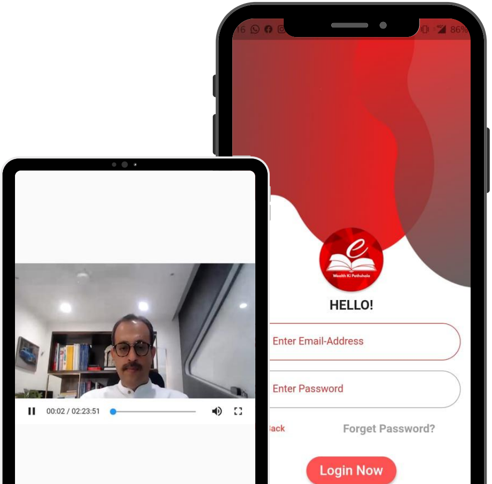
HOW IT WORKS?

Equitywala Mobile Application

Now Available on:

Available on the App Store

GET IT ON Google Play



What are you eligible for?

- Dedicated Application Login will be generated after enrollment
- One to one Meeting with Mr. Hitesh Mali
- Files (PPT/PDF/Excel) will be downloadable from application directly
- Client Engagement Series & Images in your branding
- Webinar recordings will be available post session for future reference
- Informative Audios/Videos will be available
- Access to different Digital Profile s will be given

The **TEAM** Behind

Bhargavi Dasmanthurao

Happy To Help HR

Shreni Mehta

The Opportunity Creator

Roshni Patel

Genius Researcher

Priyanka Patil

Classy Networker

Jhanvi Shah

The Tech Monster

Rutu Patel

The Ultrachic Designer

Drashti Patel

Mind Behind the Words

150+ Happy NBT Partners

TESTIMONIALS

Excellent is the word I know and can describe
It was top five star no second thought

- Mannoj Rijhwani
Financial Mentor

Dear sir, we are overwhelmed by your session exclusively conducted for our clients.....we are continuously recieving positive feedbacks from many of the participants.....you have once again done your magic of positively motivating people.....hats off to your energy and presentation skills.....thank you so much and we look forward to conduct many more sessions like this in coming future..... all is at Dhanashree Investments sincerely thank you for your precious time.

- Dhananjay Kale
Financial Mentor

We would like to thank you for conducting such a wonderful webinar for all our clients. In this current situation, where the market is so volatile and uncertain, the clients were in a panic mode. They were all confused either to stop their SIP or continue, but the webinar conducted by Hitesh Sir, helped them understand that volatility & uncertainty, is not the time to panic or make redemption, but it is one of the golden opportunities where they can make more profit by just staying in the market and topping up their existing investments. His session helped clients gain confidence of the volatile markets and instead of redeeming, we are doing top up in clients portfolio. We really thank Hitesh Sir for sharing his experience and knowledge with us. Would also like to thank the entire team of Next Big Thing for conducting such an amazing webinar.

-Meenakshi Sikchi
Financial Mentor

It was really amazing session for our clients. With the help of webinar/ technology platform we are able to connect with our clients in lock down situation also. This has created a different image of ours in the mind of client by providing information related to market as everyone was in a fear and worried about their investments which gave them a positive hope. Thanks to Hitesh Mali and NBT Team.
Each and every client who attended this session is very happy and satisfied with the information provided.

- Paras Devang Shah
Financial Mentor

In Current Market scenario Mr. Hitesh Mali has conducted one webinar for Clients Of Pathway Investments. In this panic situation they understand importance of allocation, World market situation, Pendulum of Greed & Fear.
After our webinar many client call me and said thanks, bcos of no one is doing such kind of activity. Some client clear his view for investments in mf, top up in sip, pms, direct eq. So thanks mr. Hitesh mali for kind support in such market condition.

- Urvish Vasanwala
Financial Mentor

A Big Thank You to Hitesh Bhai and for Addressing my Clients through webinar today on Current Market Scenario and the Way forward . ...It was a big Birthday Gift for me by Hitesh bhai to address my clients on my Birthday and a very Auspicious Start to the New Financial Year 2020-21 .Thanks to NBT team who helped with arranging and Preparing for this webinar .

- Vishal Baxi
Financial Mentor

A day declared as Janta Curfew and you guys has helped in creating our first online client webinar successful all credit goes to Team Equity Wala, We really appreciate your support in such tough time where there is a panic in our investors and really needed some guidance and support, where you guys has helped us with full energy and enthusiasm we are really thankful to you guys. Special thanks to Hitesh Sir for helping me and taking presentation and sharing same to our investors which has boosted confidence in them and made my role valuable to them. Thank you so much Equity Wala team and special thanks to Bhargavi and Shreni for helping us and yes other team members too whose name are not known to us but there constant support is helping us in growing trust and business with our clients. Once again Thank you so much , Nikhil Thakker – We Care Investments

- Nikhil Thakkar
Financial Mentor

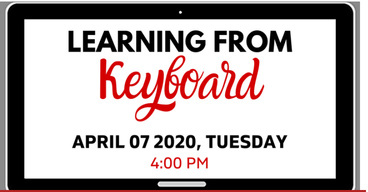
t was best webinar ever and response of clients was extraordinary. I think it will help us to get more business. Also clients are eager to attend webinar on regular base. Thank you so much Mr. Hitesh Mali sir and team Equitywala team. "Low Cost , Less Time , More Knowledge "

- Gajendrasinh Parmar
Financial Mentor

There should not be any better sessions like these sessions These all sessions are priceless . The way you have guided and directed and given motivation during these days are amazing and priceless. You have guided on all subjects , office management , Digital Marketing, staff management, marketing , Nutrition, Stock Market , Life Insurance, Learning from others , Back-office team training, and so many topics.

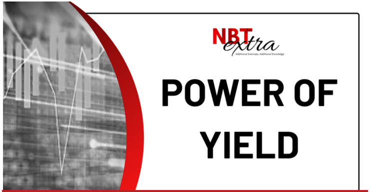
- Dinesh Bhalwala
Financial Mentor

HIGHLIGHTS



Learning From Keyboard

Everyone is working from home, Either using laptop or Computers: One thing that is common in Both is " Keyboard". When heard this word you will have question in mind: How Keyboard and Business is Related?
Life time Learning.

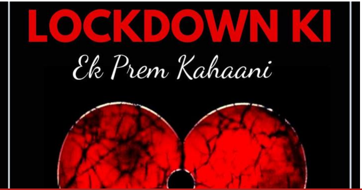


Power Of Yield

When we talk about Yield we always think about Investment Yield, this session focused on Different Yield of Business.

Kya Aapka SSIT Plan Sahi Hai?

Your Money, Your Life , Our Planning" India is Giant, S.S.I.T is a killer product



Lockdown ki Ek Prem Kahaani

(It is the time to fall in love with New Client): A session which focused on Strategy to implementSahi Samay, Sahi Soch, Sahi Mauka

Kya Badlega?

There is a chance that our business will grow in the coming years. " Word DOMESTIC will get more popular", We also observed people will have less expenses, so the savings ratio increases, Huge investment opportunity will be seen.

Ehsaas Se Vishwas

Try to Move yourself to Empowering Belief Who believes in themselves, they will move ahead, When Planning is proper, when there is no fear, when your intention is clear, When there is no regrets, When you have Vishwas,You will achieve a milestone.

FEE STRUCTURE

Make the commitment to invest in your greatest resource – YOU

Full Payment Mode

₹ 42,500/- + GST= 50,150/-

Installment Mode

₹ 15,500/- + GST= 18,290/-

*You are entitled to pay the above mentioned amount equally for the first 3 quarters, and **NO PAYMENT** in the last quarter.

CONNECT WITH US

Drop us a mail on:

grow@equitywala.com

Call us on:

+91 98191 57787

We will be pleased to address your queries anytime!

During lockdown we conducted

130+

webinars and trained

22K+

participants

#NBTFamilyGetsBigger