

STRONG ETHIC AND HONEST ADVICE DRIVES TAURUS WEALTH ADVISOR'S SUCCESS

Bhavnes Thakkar, Chief Executive Officer of **Taurus Wealth Advisors Ltd**, explains to **Tom Burroughes**, *WealthBriefing* Group Editor, what has marked the firm apart this year.

Please explain what you think makes your firm successful in its chosen field.

I believe that a key ingredient in the success of a business is the core ethics it imbibes in managing all its stakeholders. Given the nature of the business, we are continuously dealing with unpredictability; yet, the core premise of maintaining our clients' interests at the forefront of our advice, is what assures us of the continued faith and confidence reposed in us by our clients.

The clients trust that while timing the market perfectly may not always be possible but providing honest advice that is free of conflict of interest and aligned with their interests and investment objectives (rather than driven by revenue) is what we have built our business on. As an organisation, we are focused on being provider agnostic which helps us to be true to our clients in giving unbiased and honest advice.

What have been the main obstacles you had to overcome and how did you do so to reach this level?

Impediments can turn out to be opportunities or obstacles depending on how you perceive them. Our capacity for adaptation and agility has been put to the test in a constantly evolving terrain and the current economic climate. We have taken this as an opportunity to reinforce with our clients that we are prepared to service them both through in-person engagements and digital platforms.

Another core challenge remains around attracting the right talent. Bankers who have been indoctrinated in a "targets-first" approach often find it difficult

to re-orient themselves to a "clients-first" approach.

How do awards such as this make a difference to your firm and your colleagues?

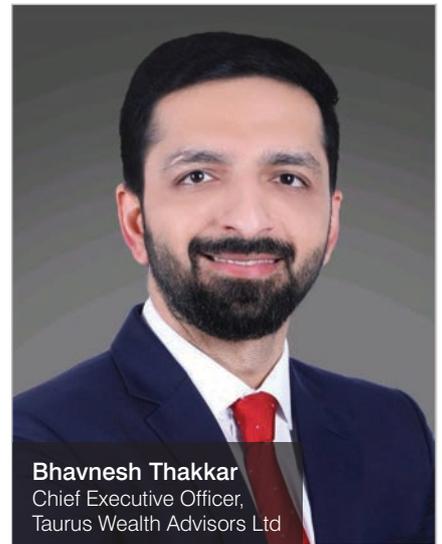
Put plainly, such awards make a marked difference in providing validation to our approach and efforts. Being awarded within a reputable and well adjudicated Industry program assures all of the discernment that underlies the review and selection process and adds positively to the industry-wide perception of the winners.

It is not just about industry recognition and reaffirmation of our team morale but also, importantly so for our clients. It is an independent testimony to the hard work that has been done.

I am confident that this accolade will help reinforce the level of comfort and confidence that our clients bestow in us, knowing that as an advisory firm, Taurus Wealth has been able to persevere through difficult and challenging markets while at all times maintaining the highest level of transparency, integrity and empathy towards their desires and needs.

What does success look like to you – can this be measured in hard numbers, or in qualitative ways, or both?

Most team members have been working with me for the better half of a decade, while few have been a part of the team for over 10 years. While profitability is important, our team is both our pillar of strength and our primary measure of success.



Bhavnes Thakkar
Chief Executive Officer,
Taurus Wealth Advisors Ltd

Can you sum up the philosophy that sums up your firm/you the best?

At Taurus Wealth, we embody values, such as respect, discretion, insights, integrity and trust. This was our ethos when we started the firm, and it remains so today.

Importantly, the success of the firm is viewed as an aggregation of the evolution and success of each of our colleagues within the client-centric approach advocated by the firm. ■



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