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## Digital-First, Human-Centric: Nikita Chokshi on Elevating Client Engagement at Nuvama Private

## Nikita Chokshi

Head – Client Engagement and Marketing Nuvama Private



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As ultra-high-net-worth clients demand real-time insights, seamless reporting and truly bespoke advice, Nuvama Private is redefining the wealth-management experience through strategic digital transformation. Nikita Chokshi, Head of Client Engagement and Marketing, outlines how the firm's enhanced mobile and web platforms, Al-powered WhatsApp chatbot and Generative Al tools are empowering both clients and advisors—preserving the human trust at the heart of private banking while delivering greater speed, clarity and personalization across every interaction.

How are you engaging technology to digitize your business and enhance the client experience? Which areas—whether advisory, reporting, or execution—are being transformed through digital tools and AI?

Over the decades, one truth has remained constant in finance: the best outcomes emerge from consistent, thoughtful progress. While the core of private wealth management continues to rest on human insight and trust, the tools delivering this value are evolving at a rapid pace. Among these, digital transformation stands out as a powerful force for betterment, bringing greater intelligence, speed, and precision to every client interaction.

Ultra-high-net-worth individuals today seek more than traditional advice. They expect real-time access, clarity in reporting, and strategic, bespoke insights tailored to their unique goals. In response to this shift, private wealth firms are embedding technology that empowers both clients and advisors alike.

To meet these evolving expectations, we have significantly enhanced our digital ecosystem across advisory, reporting, and execution. Our mobile app and website are now key interfaces in this transformation, delivering curated insights and analytics with simplified navigation and on-demand access-enabling clients to stay in control of their wealth, wherever they are.

Across the industry, the use of artificial intelligence (AI) is becoming central to client servicing. In line with this trend, we have

introduced an AI-powered WhatsApp chatbot that responds instantly to client queries with intelligent, contextual answers based on individual portfolios and preferences. This not only enhances responsiveness but also preserves the personal touch that is integral to trust-based relationships.

Digital transformation also extends to empowering advisors to deliver deeper value. As Generative AI (Gen AI) gains momentum, wealth managers are actively exploring its application in research, portfolio analysis, and client communication. We are implementing Gen AI to automate complex analysis, generate timely portfolio commentary, and equip advisors with actionable insights. This allows us to deliver high-quality, relevant advice faster, while enabling our teams to focus on strategic discussions and long-term planning.

Beyond digital interfaces, curated high-touch experiences are also gaining prominence. Exclusive thought-leadership forums and immersive client events are becoming powerful tools for engagement. The integration of AI-enabled booths and intelligent feedback systems at these events allows for more insightful interactions—ensuring each engagement is not only memorable but also meaningfully aligned with client preferences and evolving needs. Industry players are actively exploring these innovations to foster more personalized and data-informed relationships.

Technology is guiding the transition from transactional to relational wealth management. Every digital touchpoint, when applied with intention, contributes to greater clarity, relevance, and trust. As the industry moves toward higher levels of personalization and digital agility, firms are building thoughtfully - anchored in long-term vision and committed to delivering exceptional value.

core principles of integrity, insight, and client-centricity continue to endure.

In wealth, as in life, progress is shaped by attentive listening, wise action, and steady discipline. While the tools may evolve, the

