

Trust Delivered



It was just another day at the Birla Sun Life Asset Management office. Emails were being sent, forms were being filled and queries were being answered. Pradeep Sharma and his team found a new unresolved case pop in their mailbox. They were handed over the legacy cases. And Mr. Rao's case was transferred to Rima Kaul.

Rima opened the file and found that in the month of June 2013, Mr. Rao's mutual fund had matured. A cheque had been sent to him, but it came back as quickly as it had been dispatched. The cheque remained undelivered for one year, even though the team in Chennai tried to reach Mr. Rao through letters, which met the same fate as the cheque.

Since Mr. Rao couldn't be reached through the traditional medium, the team had to find another way. The solution was

found where the problem was: in the case file. Mr. Rao's account was managed by Standard Chartered. A bank which, as luck would have it was in the same building as the Birla Sun Life Asset Management office. As trusted partners, the team was able to speedily speak to the Standard Chartered Wealth Management team to ask for help.

Mr. Rao, they said, had passed away four years ago, and the only information they could provide was his son's email address. And the son was in Kuwait with his mother.

As soon as she got her hands on the email address, Rima got down to writing a mail to Ajay, Mr. Rao's son, detailing out the case and explaining that a substantial amount was lying unclaimed.

With a way forward in hand Rima transferred the project to Shikha, both Shikha and Pradeep were anxious to see where this tale would lead them. In today's world of scams and spam the team has become accustomed to facing a tumultuous start to the conversation. However, where the team expected skepticism they found appreciation. Ajay was in fact thankful for the information provided. But was mildly confused, as this amount hadn't been brought up during previous investigations of his father's wealth holdings. With personal details requested, Ajay was hesitant at first. But the team's conviction and persistence in building trust paid off, and he agreed to come to India to get the paperwork finalized. There was, however, one hiccup. As part of the fund transfer process, a large number of documents were needed. Having moved countries and with Mrs. Rao being a senior citizen, the family was struggling to put everything in place.

The team didn't give up. They went beyond the normal process to understand the legalities and streamline the process, at all times accounting for Mrs. Rao's comfort and convenience. With that done, the Rao's made a trip to India. And after three weeks of being in touch, when they finally met, Shikha and the team felt a connection with the family, and spent hours chatting with each other.

When the money was finally claimed, the team was overcome with a sense of pride. They had built trust through their sense of integrity and delivered with passion. Something the Rao's appreciated.

But, just because the case had ended didn't mean the relationship had. The team followed up with Ajay to ensure everything was conducted smoothly. Ajay and his mother didn't just leave India with the money, they left with a smile of gratitude they had reserved for the Aditya Birla Group.