PUNE TRAINING COMPANY

Future-Proof Your Legacy: A Practical Guide to Family, Wealth & Succession Planning

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INTRODUCTION

Succession planning is not only for high-net-worth individuals or business families. Every working professional builds assets over time - salary savings, EPF, gratuity, insurance policies, investments, employee stock options, real estate and family wealth.
This webinar provides practical insights into how individuals can create a structured succession plan to ensure smooth transfer of assets, financial security for loved ones and preservation of family legacy. The session will cover key legal and practical aspects of Wills, nominations, trusts, gift dees and other estate planning tools relevant for modern families and professionals.

OBJECTIVE OF THE WORKSHOP

The workshop aims to:

- Create awareness about the importance of succession planning for working professionals and families
- Explain the legal tools available for effective wealth transfer
- Help participants understand the role of Wills, nominations, trusts and related instruments
- Highlight common mistakes and practical challenges in succession planning
- Enable participants to take informed steps towards securing their family's financial future

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METHODOLOGY

The session will be conducted through:

- Practical examples and real-life case studies
- Simple explanation of legal concepts and succession tools
- Interactive discussions and audience questions
- Illustrative family and asset planning scenarios
- Action-oriented takeaways and best practices

KEY FOCUS AREAS

- Why succession planning matters for every family
- Understanding Wills and their practical importance

- Nomination vs legal succession
- Planning for investments, EPF, insurance and other financial assets
- Succession planning for jointly held properties and family assets
- Private Trusts and long-term family wealth protection
- Power of Attorney and Living Wills
- Best practices for creating and reviewing succession plans

LEARNING OUTCOMES

Participants will be able to:

- Understand the importance of succession planning
- Identify the assets that should be included in a succession plan
- Understand the role of Wills, nominations and trusts
- Recognize common succession planning gaps and risks
- Take practical steps towards creating a comprehensive family succession plan
- Make informed decisions to protect family wealth and ensure continuity

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WHO SHOULD ATTEND

This session is relevant for:

- Working professionals across all levels
- Senior management and leadership teams
- Employees planning long-term financial security for their families
- Individuals with investments, insurance, EPF, ESOPs or immovable properties
- Parents and caregivers planning for dependents
- NRIs and individuals with assets in multiple locations
- Anyone interested in preserving family wealth and creating a clear legacy plan

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FACILITATOR

Malvika Baxi
Head – Employment Law, Real Estate & Private Client Practice
LegaLogic Consulting

Malvika Baxi is a legal and business advisory professional with over a decade of experience advising domestic and international clients on complex employment, succession and real estate matters.

As Head of the firm's Employment Law Practice, she advises organisations on workforce structuring, employee relations, workplace investigations, workforce transitions, compliance and strategic workforce risk. She is particularly recognised for her expertise in POSH, Labour Codes implementation, internal investigations and workplace governance.

As part of her Private Client practice, Malvika advises business owners, high-net-worth individuals and families on succession planning, estate planning, Wills, trusts and wealth transition strategies.

She is also an External Member on the Internal Committees of several leading organisations and regularly conducts executive workshops and leadership programmes on employment law, workplace governance, Labour Codes and emerging regulatory developments.