

23rd July 2021, Friday • 4 PM, Mumbai
10:30 AM, London • 5:30 AM, New York • 6:30 PM, Hong Kong

Succession Planning: Ensuring the Continuity of Business & Wealth

The uncertainties inflicted on life by the current pandemic cannot be overstated. For a business promoter, succession planning is much more than transition of wealth and business ownership. A plan that protects the future of business and the interest of all family members will be considered an effective succession plan. However, for this, it is important to understand the nuances of one's business from its economic interest prior to segregating the ownership. Through relevant case-studies and examples, this session will aim to help Families eliminate uncertainties in the transition processes to the heirs

ABOUT OUR SPEAKER



Sonali Pradhan • *Head of Wealth Planning,*
Julius Baer India

Sonali Pradhan is Head of Wealth Planning at Julius Baer Wealth Advisors (India) Private Limited. Based in Mumbai, she oversees the Wealth Planning proposition in India. In this role, she engages with clients to facilitate solutions tailored to estate planning, relocation planning and asset structuring needs along with empaneled experts. She also has expertise in philanthropy and designing governance framework for family owned business.

Sonali has over 15 years of experience in the banking industry. Prior to the current role, Sonali was Head of Wealth Planning at the RBS Group and Sanctum Wealth Management. She has also worked as Associate Director at Warmond Trustees & Executors Pvt. Ltd., where she assisted High Net worth Individuals with estate planning solutions. Sonali also has to her credit the successful design and implementation of InstaWill, an online Will writing platform. In the past, she has been a part of many known companies; HDFC Bank, WIPRO Infotech, IDBI bank and Citibank N.A.

Sonali is a certified Trust and Estate Planner by AAFM and holds a Master's degree in Business Administration with a specialisation in Finance from the Institute of Management Education, Pune.

TO REGISTER YOUR PLACE TODAY

Strictly pre-registered guests only. Registration is complimentary for all Campden Club, IPI & Campden Family Connect Members. To confirm your participation, contact Janhavi Desai on : 9004 086579 or janhavi@campdenfamilyconnect.com