



ESTATE PLANNING
WILL / POA / GUARDIANSHIP / TRUSTS
OUR BOUQUET OF SERVICES
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I am the proud member of the Nexgen Estate Planning Solutions!! As a member, I have joined the fraternity of Estate & Succession Planners that enables me & my team to offer Estate Planning Solutions to our clients.

My mission in collaboration with NexGen is to ensure Will Writing & Estate Planning services are accessible to all, securing families futures across generations. Every Individual is uniquely placed both professionally and personally and requires customized solutions to pass his or her Estate to the next generation. We as members of NexGen ensure that we are able to provide best suited comprehensive advice to meet the unique requirements of each of our clients.

Our services provides end-to-end estate planning solutions covering the entire gamut right from estate planning audit, wills & related services such as safe keeping and probates to customized trusts, business succession planning including bereavement advisory service.

Estate planning is all about ensuring one's wishes/desires regarding one's assets are implemented in the most expeditious and cost-effective manner. Estate planning is not something that should only be considered by wealthy or retired people, no matter how substantial or modest one's assets and property may be, without proper planning, passing them on can lead to complications, disputes and impose large costs on the estate.

Our Services Includes

1. **ESTATE AUDIT:** This is a comprehensive audit of one's estate to ensure that on the demise of an individual his/her assets will pass on in a smooth and efficient manner to one's intended beneficiaries. Our Estate Planning Professionals will look carefully at the individual circumstances, objectives and asset profile and based on their assessment, provide the appropriate advice and solutions necessary to ensure the assets will be passed on to intended beneficiaries in hassle-free way.

2. **WILL WRITING AND RELATED SERVICES:** The idea about writing a will can give rise to the morbid thought of death and hence the financial advisors tend to hesitate about discussing this very important subject with their clients. We as members have access to various articles and other material which could be effectively used by them to create awareness about the need and importance of writing a will and other value-added services which the clients could avail of to safeguard the future of their loved ones. Our comprehensive range of will writing services and solutions include will drafting, will validation, safe keeping, and registration of wills, probates and executorship services.
3. **TRUSTS & RELATED SERVICES:** Globally, private trusts are widely used as an effective tool for estate and succession planning. Many families set up private family trusts for smooth inter- generation transfer of wealth. As Members of NexGen we can help clients create trusts and also provide professional trusteeship services.

The broad scope of work for trusteeship service:

- a. Managing and administering assets under the trust
 - b. Keeping books and accounts
 - c. Administering investments
 - d. Acting in the best interests of the beneficiaries
 - e. Implementing the directions of the settlor
 - f. Distributing assets to the beneficiaries in the manner provided by the settlor
4. **TRUST FOR MINOR/SPECIAL CHILD PROTECTION:** A unique trust product to safeguard the interest of a minor/special child on death of his/her parent(s). Very often, the wealth/assets left behind by the parent(s) for the minor child (ren) are misused/mismanaged by the relatives/guardian. Our robust trust structure, combined with the discipline, integrity and strong value system guarantees complete financial security of the child (ren), and peace of mind for the parents.
5. **BEREAVEMENT ADVICE:** Has a client died without a will and the family is clueless as to whom to approach for help? Or is the executor of the client's will looking for help in performing his/her obligations? We as members of NexGen understand that at such a difficult time, it can be overwhelming for those who are left behind to deal with the legal processes to settle the deceased's estate.

We support such families/executor by providing assistance and guidance on what to do when someone dies by:

- a. Establishing the existence and validity of a will
 - b. Requirements for statutory notices and the Probate process
 - c. Establishing beneficiaries and inheritance rights
 - d. Distribution of property and assets to the correct beneficiaries at the correct time
6. **POWER OF ATTORNEY (POA) SERVICES:** When a person is unable to look after his/her own affairs, he/she generally wants those closest to them to manage the affairs on his/her behalf. POA is a legal document that lets a person (the 'donor') appoint people (known as 'attorneys') to make decisions on his/her behalf in such a situation. We offer a complete package including drafting of the PoA, safe keeping and verification of "trigger events" before hand-over of PoA to the attorney to prevent possible misuse.
7. **Estate Planning Advisory Services:** Having us Member NexGen as a partner assures a complete peace of mind no matter how complex the situation is! This is because apart from the above services, we also provide advice and even implementation assistance, on all the matters given below:
- a. All round legal assistance including advising on the best course of legal action in any matter which impacts your estate and/or inheritance rights.
 - b. Advising and structuring of cross-border transfer of assets e.g. to one's child in US, keeping in mind the recipient country's laws and regulations.
 - c. Succession Advisory Services for Business & Personal Assets (Usually preferred by Clients having Net worth above 50 Cr).
 - d. Pre-nuptial agreements and other special situation cases
 - e. Advising, structuring and establishing of (ir)revocable living trusts
 - f. Business Succession advisory
 - g. Advising on family estate reorganizations
 - h. Advising on all HUF related matters



www.pankajbuckshey.com