

SUCCESSION PLANNING ACROSS GENERATIONS

GENERAL INFORMATION

Course Date: 10 October 2025

Time & Duration: 10:00 – 12:30

Course CPD's: 2,5 units

Language: English

Delivery Mode: Online, via Zoom

Speaker/Instructor: Nicky Xenofontos / Advocate – TEP (certified trust and estate practitioner by STEP UK, STEP Cyprus Branch Chairwoman, certified AML Compliance Officer)

Fees: €85

Organiser: AUCY in conjunction with N. Xenofontos LLC Law Firm

COURSE DESCRIPTION

AIMS & OBJECTIVES

Passing wealth to future generations is a top priority for many families and business owners; however, the process often presents financial, emotional, and legal challenges. Planning early and deliberately is crucial, conversations about wealth transfer now start earlier than in previous generations.

This seminar aims to familiarise practitioners with valuable insights and strategies to help clients navigate the complexities of succession planning and ensure a successful transfer of wealth for future generations both from a personal and business aspect.

The overall objective is to provide professionals within the services industry with the necessary knowledge and tools to advise clients on key strategies for protecting and preserving wealth, emphasising that thoughtful and well-thought-out structures are the cornerstone of a prosperous legacy.



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**NIKI
XENOFONTOS**

WHO SHOULD ATTEND

This seminar has been designed for all professionals (Directors, Auditors, external Accountants, Tax advisors, Legal professionals, Trust service providers, etc) who wish to gain a thorough understanding on the challenges of succession planning.

LEARNING OUTCOMES

YOU WILL LEARN ABOUT:

- Different succession planning structures (wills, trusts, business continuity)
- Considerations for personal and business succession planning
- Succession planning best practices
- Cypriot and EU legal framework (EU Succession Regulation, Administration of Estates, Wills and Succession, trust laws)

TRAINING OUTLINE

- 09:45 – 10:00 Registration
- 10:00 – 11:30 Succession planning – where to start? Structures for future succession and planning
- 11:30 – 12:15 Best practices, challenges and considerations
- 12:15 – 12:30 Q & A Session

What's Included:

- Course material
- Certificate of Attendance

CERTIFICATION

Participants will receive a Certificate of Attendance for 2,5 CPD units subject to full attendance of the webinar.

- **Payment:** Bank Transfer / Credit or Debit Card.
- Fees are non-refundable in case of non-attendance



MORE INFO:

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