PRIVATE REFERRAL BRIEF

Continuity Architecture

for Business Families

Dr. (HC) Sandeep N. Setty

Family Continuity Architect

Chartered Trust and Estate Planner

Marvella Global Financial Services · Bengaluru

EDITION 2026

By private introduction · Confidential by default

PRIVATE BRIEF FOR INTRODUCERS

Wealth is tested in transition.

A private referral brief for Chartered Accountants, senior lawyers, bankers, trustees, and family office professionals.

IN ONE SENTENCE · FORWARD THIS TO YOUR CLIENT

Sandeep helps business families build continuity architecture so that control, liquidity, governance, and succession remain stable across generations — working alongside, never in place of, the family's existing advisors.

I	II	III	IV	V
CONTROL	**LIQUIDITY**	**GOVERNANCE**	**SUCCESSION**	**DOCUMENTATION**
Decision rights	*Capital access*	*Written rules*	*Sequenced transfer*	*Aligned intent*

THE FIVE PILLARS OF CONTINUITY ARCHITECTURE

WHEN TO BRING ME IN

Bring me in when a business family has built substantial value, but continuity still depends too heavily on one person, one assumption, or one untested structure.

- Control is concentrated in one or two individuals
- Succession remains unclear, delayed, or emotionally avoided
- Liquidity may be weak at a critical moment
- Multiple entities, branches, or jurisdictions without one continuity design
- Legal, tax, ownership, and family arrangements exist, but no one is sure they align
- Next generation entering ownership without clarity on rights and roles
- Existing structures no longer match the present scale of wealth
- Cross-border, NRI, or OCI exposure handled in parts, not as one architecture

WHAT I DO

Intent is not architecture. I advise business families, founders, and promoter-led enterprises on the continuity architecture behind control, liquidity, governance, succession, and documentation alignment.

My role begins where strong professionals often finish working separately. I am brought in when tax, legal, banking, trust, ownership, and operating realities must work together as one continuity-ready structure.

Every serious engagement begins with a **paid Private Legacy Flow Audit —** a discreet, personally led diagnostic that clarifies where continuity is strong, where it is fragile, and what deserves attention first. Recommendations follow diagnosis.

WHAT I DO NOT DO

I do not replace the family's Chartered Accountant, lawyer, banker, trustee, family office, or investment advisor. I do not compete for their existing mandate. I do not position as a wealth manager or an insurance-first advisor. I do not lead with products. I work as a continuity architect — a coordinating discipline that helps the right professionals work from one clearer continuity logic.

BEST-FIT SITUATIONS

— Promoter families and founder-led enterprises

— Business families with concentrated control or ownership complexity

— Families approaching generational transfer

— Cases involving fairness, control, and continuity tension

— Situations where continuity failure would be commercially or reputationally costly

NOT THE RIGHT FIT FOR

— Routine retail financial planning

— Product-shopping enquiries

— Simple will-only matters with no broader continuity complexity

— Situations where the family wants execution without diagnosis

WHY ADVISORS REFER ME

Advisors refer me when the structural layer of a family's wealth has grown beyond what any single professional can coordinate alone. I work alongside you — your client, your mandate, your relationship — adding the continuity lens that lets your own advice land more cleanly. Most families do not lose control in a crash. They lose it in a real-life moment when clarity, authority, liquidity, and documentation fail to meet each other properly. That is the layer I diagnose.

HOW REFERRALS ARE HANDLED

Referrals are handled privately, respectfully, and without pressure. Where useful, I am glad to first have a private conversation with the referring advisor before any family is introduced. Every serious enquiry is reviewed personally. There is no junior outreach.

SELECTED PLATFORMS · RECOGNITION

Selected speaker at FKCCI, Hindustan Education Fraternity (HEF), and Rotary forums on family continuity and intergenerational planning (2026). Author of four published books on wealth, planning, and continuity. Chartered Trust and Estate Planner.

By private introduction · Limited mandates · Personally led · Confidential by default

HOW TO BEGIN

WHATSAPP · PREFERRED	EMAIL	WEBSITE
+91 97436 83444	sandeep@sandeepnsetty.com	www.sandeepnsetty.com