



BOMBAY CHARTERED ACCOUNTANTS' SOCIETY

# SUCCESSION & ESTATE PLANNING

## ADVANCED TAX AND LEGAL ASPECTS

SATURDAY, 4<sup>TH</sup> JANUARY, 2025 | 8:00 A.M. TO 6:00 P.M.

### ABOUT THE PROGRAM

Succession Planning is crucial to ever evolving family and business dynamics with complex legal laws and business environment.



Walchand Hirachand Hall, IMC, Churchgate

Organized by

**FINANCE, CORPORATE &  
ALLIED LAWS COMMITTEE OF THE BCAS**

Chairman: CA Naushad Panjwani

Convenors: CA Sneh Bhuta, CA Khubi Shah Sanghvi, CA Raj Khona

Mentor: CA Kanu Chokshi

Co-ordinators: CA Kinnari Gandhi, CA Khubi Shah Sanghvi



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# WHY ATTEND?

- ✓ Insights from top practitioners
- ✓ Better understanding of the nuances of inheritance laws
- ✓ Key knowledge regarding estate planning structures through Wills and Trusts
- ✓ Guidance in formulating various domestic and foreign succession strategies
- ✓ Evolvement and understanding of family offices and their structure in India

**FEE** (GST Inclusive)

**Members- Rs. 2,360/- | Non Members - Rs. 3,540/-**

## EVENT SCHEDULE



**Session 1**  
Key Strategies for  
Wealth Transfer  
**CA KETAN DALAL**



**Session 2**  
Legal Framework of Wills  
and Probate: Drafting  
and Contesting Wills  
**ADV. BIJAL AJINKYA**



**Session 3**  
Trusts in Estate  
Planning: Structuring,  
Taxation, and Legal  
Framework  
**CA SURESH SURANA**



**Session 4**  
Cross-Border Estate  
Planning: Navigating  
International Tax and  
Legal Complexities  
**ADV. NISHITH DESAI**



**CA PARTHIV KAMDAR**



**CA ANUP SHAH**

**Panel Discussion**  
Key Challenges and Future Trends in  
Succession Planning



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