



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.



IMC, Churchgate

Organized by

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



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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. 1,770/- | Non Members - Rs. 3,540/-**

Early Bird till 20<sup>th</sup> December, 2024

## EVENT SCHEDULE

### Session 1

Advanced Tax Implications/Aspects in Succession: Key Strategies for Wealth Transfer

### Session 2

Legal Framework of Wills and Probate: Drafting and Contesting Wills

### Session 3

Trusts in Estate Planning: Structuring, Taxation, and Legal Framework

### Session 4

Cross-Border Estate Planning: Navigating International Tax and Legal Complexities

### Panel Discussion

Key Challenges, Future Trends in Succession Planning & Evolution of Family Offices



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