



BOMBAY
CHARTERED
ACCOUNTANTS'
SOCIETY

FAMILY OFFICES SUMMIT 2025

11TH JULY 2025

The Rooftop & Malabar,
Trident, Nariman Point **Mumbai**



**An Exclusive Forum for
Visionaries, Strategists
& Legacy Builders**

Co-sponsored by:



SUNDARAM ALTERNATES
— Sundaram Finance Group —

TRILEGAL

SCAN FOR
REGISTRATION



Session 1: 9:30 am to 11:00 am

Key trends discussion - Emerging Trends and Realities - Family office growth, investment strategies

- Vikaas M Sachdeva – MD, Sundaram Alternates
- Partha Gosh – CEO, Hinduja Family office
- Arjun Vaidya – Co-Founder - V3 Ventures, Verlinvest
- Vineet Rai – Founder/Vice Chairman, Aavishkaar Group

Moderator – Devashish Khanna – CIO, Capri Global Family Office



Session 2: 11:00 am to 12:30 pm

Legal and Tax Structures for Succession in Family Offices

- Tanmay Patnaik – Partner and Head - Private Client, Trilegal
- Girish Vanvari – Founder, Transaction Square
- Falguni Shah – Partner and Leader - Entrepreneurial & Private Business, PwC

Moderator – Rutvik Sanghvi – Partner, Rashmin Sanghvi & Associates



Session 3: 1:30 pm to 3:00 pm

Building Effective Governance Structures for Long-Term Family Succession

- Parthiv Kamdar – Partner, Deloitte
- Ketan Dalal – Managing Director, Katalyst Advisors
- Suraj Mailk – Founder, Legacy Growth Partners

Moderator – Priti Savla – Central Council Member, ICAI



Session 4: 3:00 pm - 4:30 pm

Role of family offices in AIFs

- Rubin Chheda – Managing Director, Neo Asset Management
- Aditya Jha – Partner – Asset Management & Funds, Trilegal
- Anirudh Damani – Managing Partner, Artha Venture Fund

Moderator – Ritwick Ghoshal – Executive Director & Head International Business & Family Office, Centrum Wealth



Session 5: 4:30 pm to 6:00 pm

Real-Life Case Studies in Succession Planning: Success and Challenges

- Priti Rathni Gupta – Promoter, Anand Rathni Group
- Nita Shivdasani – Managing Director and Head - HERitage, Waterfield Advisors
- Aashish Sommaiya – Executive Director & CEO - WhiteOak Capital Asset Management Ltd.

Moderator – Mahesh Singhi – Founder & MD, Singhi Advisors Pvt Ltd.

Access Fee:
25,000 (incl. GST)

FAMILY OFFICES
SUMMIT 2025
Mumbai

Finance, Corporate & Allied Law Committee

- Chairman - CA Naushad Panjwani
- Co-Chairman - CA Anand Bathiya
- Convenors - CA Sneha Bhuta, CA Khushi Shah Sanghvi, CA Raj Khona, CA Rimple Dedhia
- Mentor - CA Kanu Choksi
- Coordinator - CA Kinnari Gandhi



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