



FAMILY OFFICES SUMMIT 2025

DATE

30th August 2025
Saturday

VENUE

The Rooftop, Trident
Nariman Point Mumbai

Sponsored by:

TRILEGAL

FAMILY OFFICES SUMMIT 2025

An invitation-only
forum gathering
decision-makers from
UHNW family offices to
engage in candid
conversations about
succession,
governance, global
structuring, and next-
generation wealth
leadership.

Access Fee:
₹ 25,000
(incl. GST)

50 SEATS ONLY

Early bird price
₹ 20,000
till 7th August 2025



BOMBAY
CHARTERED
ACCOUNTANTS'
SOCIETY

CURATED CONVERSATIONS

Key Trends in Family Offices

Emerging strategies in investment,
growth, and professionalization

Legal & Tax Structures for Succession Planning

Navigating cross-border complexities,
jurisdictional choices, and estate
continuity

Governance Structures for Long-Term Succession

Ensuring stability, values, and control
across generations

Family Offices & Alternate Investment Funds (AIFs)

Evaluating risk-reward frameworks, co-
investment strategies, and fund dynamics

Real-Life Case Studies in Succession Planning

Successes, challenges, lessons, and best
practices from across India's business
families

WHO IS THIS EXPERIENCE DESIGNED FOR

Principals & Promoters of
Family Offices

Founders/CEOs of Single &
Multi-Family Offices

Ultra-HNIs & Private Wealth
Owners

CIOs, CFOs & Heads of
Investment Strategy

Senior Advisors in Tax,
Legal & Succession Planning

Investors with global exposure
(GIFT City, Singapore, UK, etc.)

Decision-makers exploring
jurisdictional flexibility and estate
planning

SPOTLIGHT ON OUR PANELISTS

Keynote Speaker: **Rishabh Mariwala**, Sharrp Ventures, Harsh Mariwala Family Office

Vikas Phadnis, Auctus Capital Services Pvt. Ltd.

Devashish Khanna, Capri Global Family Office

Ritwick Ghoshal, Centrum Wealth

Parthiv Kamdar, Deloitte

Anupa Tanna Shah, Goldcrest Group

Ravi Sheth, Greatship (India) Ltd.

Suraj Malik, Legacy Growth

Jai Malpani, Malpani Group

Rahul Khanna, Metro Shoes Family Office

Rubin Chheda, Neo Asset Management Pvt. Ltd.

Anup Shah, Pravin P. Shah & Co.

Faiguni Shah, PricewaterhouseCoopers Pvt. Ltd.

Avik Ashar, Riverwalk Holdings Pvt. Ltd.

Divya Gupta, Sharrp Ventures, Harsh Mariwala Family Office

Aditya Jha, Trilegal

Tanmay Patnaik, Trilegal

Aashish Sommaiya, WhiteOak Capital Asset Management Ltd.



**TAP TO REQUEST
AN INVITE**

FINANCE, CORPORATE & ALLIED LAWS COMMITTEE

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