



BOMBAY
CHARTERED
ACCOUNTANTS'
SOCIETY



FAMILY OFFICES SUMMIT 2025

DATE
30th August 2025
Saturday

VENUE
The Rooftop, Trident
Nariman Point Mumbai

Sponsored by:

TRILEGAL



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

**FAMILY
OFFICES
SUMMIT
2025**

Early bird price
₹ 20,000
till 07th August

Access Fee:
₹ 25,000
(incl. GST)

50 SEATS ONLY



**Tap to Request
an Invitee**

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.

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

SPOTLIGHT ON OUR PANELISTS

- ❑ Family Office Heads & Multi-generational Wealth Managers
- ❑ Private Equity, VC & Alternate Investment Fund Experts
- ❑ Leading Lawyers & Tax Advisors in Global Structuring
- ❑ Succession & Family Governance Specialists
- ❑ Advisors with GIFT City, UK, and Singapore structuring experience
- ❑ CXOs & Partners from top law firms, advisory, and asset management firms

WHO SHOULD ATTEND? (DELEGATE PROFILE)

- ❑ 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

