



BOMBAY CHARTERED ACCOUNTANTS' SOCIETY

Empowering The Profession Across Bharat

DIRECT TAX RETREAT 2.0

Where Tax Law Gets Argued, Pitched, Stress-Tested and Reimagined

Dear Reader,

Direct Tax Retreat 1.0 set the foundation. **Direct Tax Retreat 2.0 builds on it.** After a first edition that redefined what a residential study course could be, the Direct Tax Committee of BCAS is back with a sequel that trades the lecture podium for the courtroom floor, the shark table for the pitch stage, and passive listening for full-contact learning. This is not a retreat where you sit back and take notes; it's one where you argue, pitch, adjudicate and walk away sharper than when you arrived.

Set in the vibrant city of Hyderabad, where Nizami grandeur meets a booming new-age economy and hosted at the elegant **Hotel Trident, Hyderabad**, Retreat 2.0 brings together India's sharpest tax minds for four days of rigorous debate, real case studies, live demonstrations and premium hospitality; all engineered to leave you not just informed, but battle-ready.

Dates and Days	Thursday 14th January to Sunday 17th January 2027
Venue	Hotel Trident, Hyderabad

Why Direct Tax Retreat 2.0?

Tax law today is being evolved in the courtrooms, and interpretations are sought through AI. Financial instruments are being reshaped in a manner that didn't exist a decade ago. Retreat 2.0 has been built for exactly this moment; not as a series of lectures, but as a set of formats designed to stress-test ideas the way the real world does: through brain storming, argument, scrutiny and live decision-making.

The Line-Up: Six Formats That Won't Let You Sit Still

1. Tax Face-off : A.R. vs. D.R. -A Battle of Perspectives (Sections 68 to 69D and 115BBE)

No PowerPoints. No hiding behind theory. A live courtroom-style battle over unexplained cash credits, investments and expenditure argued in real time by the Assessee's Representative and the Departmental Representative, cross-examined and adjudicated upon by a Chairperson that won't let anyone off easily.

2. "Tax Shark Tank": Payout strategies (including profits) for Companies + Real Estate Case Studies

Four Teams (each consisting of 2 delegates) from the participating attendees pitch-

(a) Tax-efficient strategies for getting payout from company

OR

(b) Real-life real estate transactions

— legally structured, commercially sound and built to survive scrutiny, while a panel of tax sharks scores each pitch on tax efficiency, commercial viability and litigation risk.

3. Group Discussion Paper I: Trusts, Families and the Succession of High-Stakes Businesses

Every family that has built something worth keeping eventually asks who gets it, and how, without it falling apart. This paper tackles private trusts (including Foreign Trusts), family settlements, structuring family offices, succession planning through the real structuring challenges practitioners actually encounter.

4. Group Discussion Paper II: Capital Gains/Income for a World of New-Age Financial Instruments

Financial products have evolved faster than the law meant to tax them. This session closes that gap through case studies covering AIFs, REITs & InvITs, GIFT City AIFs & Retail Funds, REIT Index Funds, Fractional Ownership of Immovable Properties, Digital Gold, STRIPs, Securitisation Trusts of Life Insurance Policies and other instruments that practitioners are seeing on their desks right now- all examined from the investors perspective.

5. The Road less travelled: The Remedies Most Practitioners Forget Exist

When the Act itself offers no easy way forward, the fight doesn't end, it moves to a different battlefield. Most practitioners stop at appeals, revisions and rectifications and assume that's where the road ends. It isn't. This session maps the terrain that lies beyond the Income-tax Act itself. Even the routine paths are traversed differently. This session maps alternative legal and constitutional remedies including RTI, the Citizen's Charter, CPGRAMS, writ jurisdiction and other allied avenues.

6. Transforming Direct Tax Practice through AI Integration

Not a session about the future — a live demonstration of what's already happening inside research desks, drafting teams and compliance functions today, covering AI tools for tax research, drafting, litigation support, compliance and knowledge management.

Plus — Networking that Matters

Beyond the sessions, Retreat 2.0 is built for the conversations that happen between them; mentorship connections, peer exchange and relationships with India's leading tax practitioners that outlast the four days.

Let Hotel Trident's warm hospitality take care of your comfort, while BCAS delivers a technically rigorous, format-first learning experience. Whether you're a seasoned litigator, an emerging voice in taxation or a professional who wants to see tax law argued rather than just explained, **Direct Tax Retreat 2.0** is where you need to be.

TECHNICAL SESSIONS LINEUP

Subjects	Faculty / Panelists / Chairman
KEY NOTE ADDRESS The Judiciary's Role in the Era of the Income Tax Act, 2025: Balancing Continuity with Change	Mr. Vijay Pal Rao, Vice President, ITAT
THE TWO SIDES OF THE TAX CASE: A Battle of Perspectives — Sections 68 to 69D & 115BBE Live courtroom-style debate: AR vs. DR argue a real, practical case on unexplained cash credits, investments and expenditure — cross-examined and adjudicated by a Chair Person.	Representatives in Litigation: Adv. Manish Shah Adv. Dharan Gandhi Chairman: Mr. D. Manmohan, Ex-ITAT Vice President

“TAX SHARK TANK”— Smart Payout strategies (including Profits)for Companies & Real Estate Case Studies Format: An interactive session where different teams from participants present tax-efficient- (1) strategies for getting payout from companies (2) Real life case studies relating to real estate transactions The proposals will be evaluated by a panel on tax efficiency, commercial viability and litigation risk.	Sharks: Advocate T. Banusekar CA Jagdish Punjabi
GROUP DISCUSSION PAPER I Case studies on Private Trusts, Family arrangements, Succession Planning, Structuring family Offices	CA Anup Shah
GROUP DISCUSSION PAPER II Case studies on Capital Gains/Income for a World of New Age Financial instruments covering <i>AIFs, REITs & InvITs, GIFT City AIFs & Retail Funds, REIT Index Funds, Fractional Ownership of Immovable Properties, Digital Gold, STRIPs, Securitisation Trusts of Life Insurance Policies</i> and other emerging instruments	CA Gautam Nayak
BEYOND COMPLIANCE- Rights, Remedies and Redressal Mechanisms every tax payer must know Presentation Paper - Effective legal and constitutional remedies – Choose the Right remedy and secure Timely relief	CA Ravikant Kamath
AI INTEGRATION IN DIRECT TAX PRACTICE Live demonstrations of AI tools for tax research, drafting, litigation support, compliance and knowledge management.	CA Vijay Srinivas Kothapalli

Enrolment Fees

Residential Basis — Double Occupancy

Pricing & Discount Timelines	Members of BCAS	Non-Members (CAs & other Professionals)
DEEP DISCOUNT: Enrolments on or before 01.09.2026	Rs. 24,500 + 4,410 GST = Rs. 28,910/-	Rs. 27,500 + 4,950 GST = Rs. 32,450/-
EARLY BIRD DISCOUNT: Enrolments from 02.09.2026 to 30.09.2026	Rs. 26,500 + 4,770 GST = Rs. 31,270/-	Rs. 29,500 + 5,310 GST = Rs. 34,810/-
REGULAR FEES: Enrolments 01.10.2026 onwards	Rs. 29,000 + 5,520 GST = Rs. 34,220/-	Rs. 32,000 + 5,760 GST = Rs. 37,760/-

Residential Basis — Single Occupancy

Pricing & Discount Timelines	Members of BCAS	Non-Members (CAs & other Professionals)
DEEP DISCOUNT: Enrolments on or before 01.09.2026	Rs. 42,000 + 7,560 GST = Rs. 49,560/-	Rs. 45,000 + 8,100 GST = Rs. 53,100/-
REGULAR FEES: Enrolments 02.09.2026 onwards	Rs. 44,000 + 7,920 GST = Rs. 51,920/-	Rs. 47,000 + 8,460 GST = Rs. 55,460/-

Non-Residential Basis

Option available only to members / non-members with registered or residential address in Hyderabad.

Pricing & Discount Timelines	Members of BCAS	Non-Members (CAs & other Professionals)
DEEP DISCOUNT: Enrolments on or before 01.09.2026	Rs. 17,000 + 3,060 GST = Rs. 20,060/-	Rs. 19,000 + 3,420 GST = Rs. 22,420/-
EARLY BIRD DISCOUNT: Enrolments from 02.09.2026 to 30.09.2026	Rs. 19,000 + 3,420 GST = Rs. 22,420/-	Rs. 21,000 + 3,780 GST = Rs. 24,780/-
REGULAR FEES: Enrolments 01.10.2026 onwards	Rs. 19,500 + 3,510 GST = Rs. 23,010/-	Rs. 21,500 + 3,870 GST = Rs. 25,370/-

Notes

- The Retreat will commence on Thursday, 14th January 2027, with the inaugural session starting at 04:00 p.m. The course will conclude on Sunday, 17th January 2027 by 01.00 p.m., followed by lunch.
- For Residential Participants: The Enrolment Fee is inclusive of lodging, boarding, course material and Rs. 50/- being contribution towards the BCAS Foundation.
- Hotel Check-in begins **at 2:00 p.m.** on Thursday, 14th January 2027.
- Lunch for residential participants on the inaugural day will be between 12:30 p.m. and 2:30 p.m.
- All participants will be accommodated in earmarked rooms on a twin-sharing basis. Please indicate your preferred room partner, if any, in the enrolment form. A single-occupancy option is also available.
- Non-Residential Participants: BCAS Members and Non-Members with a registered/residential address in Hyderabad may opt for the non-residential format. Non-residential fees include course material, 3 lunches and 2 dinners, and Rs. 50/- as contribution to the BCAS Foundation. Lunch of 14th January 2027 is not included in the non-residential fees.
- Participants willing to opt as a Group Leader for either of the 2 Group Discussion Papers are requested to mark their preference in the Enrolment Form while registering online.
- Participants interested in representing a team for the Tax Shark Tank session are requested to indicate their preferred topic (from the 2 available) in the Enrolment Form while registering online. Guidelines for those who have opted to participate in “Tax Shark Tank” session will be circulated separately.
- Refunds & Substitution: Once enrolled, requests for refunds will not be entertained and shall be at the discretion of the Direct Tax Committee. In case of cancellation, a request for substitution can be entertained till 15th December 2026.
- Participants are requested to fill up all columns in the Enrolment Form to help the Society plan efficiently, and to attach a Driving License / Voter's ID / Passport / Aadhar Card, as it will be required at the Hotel. A link for uploading the same will be provided before the event.
- For further enquiries, kindly contact Mr. Javed / Mr. Bhanupratap at BCAS (Tel: 022-61377607 / 61377620; e-mail: em1@bcasonline.org ; event.exec@bcasonline.org). Mobile: Javed 9819955293/ Bhanu 9699041664

REGISTER NOW



Direct Tax Committee

Chairman – CA Anil Sathe

Co-Chairman – CA Deepak Shah

Convenors – CA Vishesh Sangoi, CA Ronak Rambhia & CA Akshar Panchmia

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