

## Workshop on Estate Planning Wills Family Settlement- Critical Aspects

Dear Member,

In our endeavour to use the latest technology to disseminate knowledge to our members at their conveniences, BCAS has implemented a state-of-the-art e-learning platform. Many members have successfully learned and benefited through this platform.

We are happy to announce that the "Full day Seminar on Estate Planning, Wills & Family Settlement – Critical Aspects"

is now available on our E-Learning platform <https://bcasonline.courseplay.co>, the details of the course are mentioned below

### About the course:

In the fast & ever changing world, lot of uncertainties prevail. Amongst all such uncertainties, only certainty is non perpetual existence of our life. During our life time, we accumulate wealth to secure our future as well as that of future generation. But do we effectively plan for appropriate management and distribution of our wealth? Have we done proper Estate Planning including "life planning" {designating someone to manage assets and entrusting him to make health care and personal care decisions if one ever becomes unable to do so for self}?

Having knowledge about the applicable provisions of Succession law is equally important. There is a dire need of understanding various aspects of proper Estate Planning for everyone, whether a professional, or an entrepreneur or a housewife and so on....., to ensure desired succession and avoid any unfortunate disputes, strangled relations, battles in courtrooms etc.

To throw light on such an important topic and to create awareness about some of the critical aspects thereof, we have designed this course and now, made it available to all at their conveniences.

<b>Days &amp; Dates</b>	As per your Convenience	
<b>Venue</b>	As per your Convenience	
<b>Time</b>	As per your Convenience	
<b>Fees</b>	<b>BCAS Member</b>	<b>Non-Member</b>
	<b>Rs.1180/-</b>	<b>Rs.1180/-</b>

## Topics Covered:

Sr No.	Topics	Speakers
1.	<b>Estate Planning &amp; Family settlement / Family Arrangements (Through Trust / Companies)</b> <u>Likely coverage:</u> Background and the emerging need, Estate Planning incl. "life planning", Inheritance Planning, Emergence of inheritance tax in India, Family Disputes settlement /Family Arrangements / Distribution of properties – assets - Business separation etc., Private Family trusts, Possibilities of using Alternative Investment Funds or LLPs for estate planning, Offshore Trusts & Structures, Newfrontiers for	CA Dileep Choksi
2.	<b>Insights of Succession law, Intricacies of Wills</b> <u>Likely coverage:</u> Hindu Succession Act (Applicability, Intestate Male/ Female, Share in HUF, Amendment in 2005 re: Daughters), Wills (Terms used in wills, Characteristics of the will, Who can be beneficiary / Executors / Witness, Tips for preparing will, Registration of wills, Probate), HUF (Creation / Partition / Karta / Female status as karta – beneficiary etc.), Inheritance & FEMA, Nomination, Special Marriage Act, Adoption, Succession law in other religions (Muslims	CA Anup P. Shah
3.	<b>Legal issues, stamp duty, registration &amp; documentation aspects</b> <u>Likely coverage:</u> Implementation aspects of estate planning / Family Settlements / Wills/ Trusts / Joint family properties, HUF etc., Documentation, Legal intricacies, Stamp duty & Registration aspects	Mr. Pravin Veera – Solicitor
4.	<b>Taxation aspects</b> <u>Likely coverage:</u> Taxation issues in estate planning / Family Settlements / Family Arrangements /Wills/ Private Family Trusts etc., Taxation of HUF / Partitions etc., Filing of returns of deceased, Returns of Executors of Estate	CA Yogesh Thar

\*Payment details/modes are informed in the enclosed enrolment form.

Enroll for the delivery of the said course on the new e-learning platform of BCAS <https://bcasonline.courseplay.co>. Validity of the same is 30 days from the date of purchase. The exact login details will be available to the participant, after they have enrolled for the course.

Warm Regards  
CA Manish Sampat / CA Abhay Mehta  
Hon. Joint Secretaries

Date :	
<b>Enrolment Form</b>	
<b>WORKSHOP ON ESTATE PLANNING WILLS FAMILY SETTLEMENT – CRITICAL ASPECTS AS STUDY COURSE ON BCAS E-LEARNING PLATFORM</b>	
Name :	
Address :	
E-mail :	Mobile :
BCAS Membership. No. (If Applicable) :	
<b>GSTN:</b>	
<b>Please Note: Request you to submit your GST Certificate with Enrolment Form</b>	
Tel. (O) :	
Tel. (R/M) :	
Fax :	
Cash/Draft/ Cheque no :	
Drawn on : _____ Bank	
Dated :	
Amount Rs.	

Date:

Signature of Participant

Note:

Payment Mode can be: Cheque / Demand Draft / Cash or Electronic Card (at BCAS office only).

Please mention your name and membership number (if applicable) on the reverse side of the cheque/ Demand Draft. Kindly note that the cash counter timings are from 10.30 a.m. to 5.30 p.m. on Monday to Saturday. The lunch time is 1.30 p.m. to 2 p.m. Participants are requested to co-operate in this regard.

The Cheque/ DD will be in the name of "**Bombay Chartered Accountants' Society**". Your Enrolment will be confirmed only after the realization of payment at BCAS, for which a receipt will be provided for your reference.

Cancellation Policy: Kindly note that no refund will be given in case of cancellation for any reason and no substitute will be allowed, once the enrolment form is submitted.

**7, Jolly Bhavan No.2, Ground Floor, New Marine Lines, Mumbai 400020 Tel. 022 61377600**