

# Bombay Chartered Accountants' Society

## Corporate & Allied Laws Committee

**Chairman:** CA. Chetan Shah

**Convenors:** CA. Zubin Billimoria, CA. Bhavesh Gandhi & CA. Harsh Dedhia

**Programme Co-ordinators:** CA. Preeti Oza & CA. Pooja Punjabi

## Full day Seminar on Estate Planning, Wills & Family Arrangement / Settlement – Critical Aspects

*India has witnessed fights over estates and properties right from the Ramayan and Mahabharata to modern-day corporate family feuds! We spend our entire lives in building an Estate to secure our future / future of our GenNext, but do not spend reasonable time for its properly planned and timely succession (passing on the reins, wealth to the others). With the traditional society of joint families being replaced by the concept of nuclear family, Estate planning, Family arrangement / settlement have become inevitable not only for business tycoons but also for a common man (gender neutral).*

- A) *Who should do?*
- B) *Why to do?*
- C) *How to do?*
- D) *What to include / not to include?*
- E) *When to plan and implement?*

are some of the key areas to consider for Estate Planning, Family settlement / arrangements.

A well-planned succession or settlement or arrangement having regard to applicable provisions of succession laws, tax & FEMA implications and careful drafting of the related documents can avoid many litigations whether amongst the family members / legal heirs or with the tax authorities. Remember, ***'failing to plan is planning to fail!!'***

BCAS has organized a full day seminar which has both, professional and personal importance for the members to touch upon certain critical aspects thereof – with the following program outline:

Day & Date	<b>Saturday, 15<sup>th</sup> December 2018</b>	
Time	9:00 a.m. to 5:30 p.m.	
Venue	<b>Babubhai Chinai Hall, 2<sup>nd</sup> floor , IMC, Churchgate, Mumbai – 400020</b>	
Fees	<b>Member - Rs 2500/-</b>	<b>Non Member - Rs 3000/-</b>
	(Inclusive of course materials, GST, Breakfast, Lunch & Rs 50/- towards BCAS Foundation)	

➤ **Important Note:**

**Chartered Accountants can become BCAS Members by paying Rs. 1500\* per Annum and avail the discounted rate for this and all other BCAS events held during the year. Click <https://bit.ly/2IUPeCI> to download application form for Life Membership/Ordinary membership/Corporate Membership. (\*excluding taxes and entrance fees)**

<b>Sr. No.</b>	<b>Topics</b>	<b>Speakers</b>
	Keynote address	<b>Eminent faculty</b>
	Estate / Inheritance Planning  (Including, Intestate Hindu Succession Laws, Basic to Sophisticated Planning through Nominations, Wills, Trust, Gifts, HUF Partition, Daughter's Rights in HUFs, Impact of FEMA on Succession Planning, Hindu Adoption / Guardianship)	<b>CA (Dr.) Anup P. Shah</b>
	Intricacies of various documents covered in Estate planning, Family settlement / arrangements including will	<b>Ms. Shipra Padhi, Solicitor</b>
	Taxation Issues:  (a) Family settlement / arrangement (incl. stamp duty and registration aspects) (b) Trusts and Estate (incl. HUF taxation, filing of returns of deceased, Returns of Executors of Estate, etc.)	<b>CA Pradip Kapasi</b>  <b>CA Yogesh Thar</b>

Date :	
<b>Enrolment Form</b>	
<b>Full day Seminar on Estate Planning, Wills &amp; Family Arrangement / Settlement – Critical Aspects</b>	
Name :	
Address :	
E-mail :	Mobile :
BCAS Membership. No. (If Applicable) :	
<b>GSTN:</b> <b>Please provide your GST Provisional ID with a copy of certificate at the time of transaction.</b> <b>No amendment will be made in the Invoice or Receipt on a later date.</b>	
Tel. (O) :	Tel. (R/M) :
Food Preference (Tick any one preference): Veg ....., Jain .....	
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 participation 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. 61377600.**