

**THE SOCIETY OF AUDITORS (Regd.),  
THE CHARTERED ACCOUNTANTS STUDY CIRCLE &  
ASSOCIATION OF CHARTERED ACCOUNTANTS, CHENNAI**



*JOINTLY ORGANISING A TRAINING PROGRAMME ON*  
**MASTERCLASS ON ESTATE & SUCCESSION**  
**PLANNING**

**By EMINENT SPEAKERS FROM M/s KHAITAN & Co**

**Brief note on Workshop Objective:**

*Professional Updates are continuous process and the present workshop is organized with an objective of upgrading the knowledge of our members in a specialized area of Succession Planning, which is critical in handling of clients by any Chartered Accountants.*

*The Programme will cover areas like family arrangement & settlement, creation of will, comparative analysis of trust vs will vs gift, succession law in simple terms, etc. The target audience can be professionals, who are interested in addressing their common man clients as well as businessmen for ensuring the wealth created is passed on properly and with ease to the next generation.*

*A detailed note prepared by the M/s Khaitan & Co. is enclosed for more information.*

*Virtual Meeting will be held as per following Schedule:*

<b>Class #</b>	<b>Date</b>	<b>Time</b>	<b>Topic</b>
<b>1</b>	Wednesday, 21 July 2021	5 pm – 7 pm	Estate Planning Trends
<b>2</b>	Thursday, 22 July 2021	5 pm – 7 pm	Trusts as Succession and Estate Planning Tool
<b>3</b>	Friday, 23 July 2021	5 pm – 7 pm	Other Succession Planning Tool

**KINDLY REGISTER ON or BEFORE 19<sup>th</sup> JULY 2021**

Delegate fee at  
Rs.500/-  
per delegate

(GST not  
applicable)

Program Coordinators		
Name	Mobile	Email ID
CA Mahesh Krishnan	9840332523	maheshkrishnan@rgnprice.com
CA K.R. Sathyanarayanan	9840118712	sai@gvns.org
CA Vinodh Kothari	9566105599	svinodhkothari@gmail.com

**Why one should attend this programme**

Many of us have worked hard to create our personal wealth as also nurtured a business over a period of time. It would be anyone's desire to ensure that the wealth reaches the intended persons after one's life. More importantly, businesses should also de-risk to ensure that capable persons are identified and who are prepared to assume roles as and then it becomes available and necessary. This would ensure continuity of such businesses and make it more resilient to change.

Volatility in the environment cannot be more vivid than in the present Pandemic period!

Similarly, an estate plan can act as a safety net that helps preserve the value of your assets, minimizes wait times for disbursement, and helps ensure the legacy you envisioned is carried out. It protects your assets for your family (or other heirs).

The experienced speakers will be taking us through the nuances of estate & succession planning, covering areas on how to protect family name, brands, legacies created. Attending this programme will allow us to view organisations with a new lens. Strategies to de-risk personal wealth from business, understanding the various succession tools as also the vital legal considerations will be discussed.

\*\*\*\*\*

<b>Bank Account Details</b>	<p>The Society of Auditors  Savings Bank Account Number: 006001000038406  Indian Overseas Bank, Mylapore Branch  IFSC Code: IOBA0000060</p>
<b>Registration:</b>	<p><i>On making the payment, use this registration link to upload delegates' details as well as the payment reference. (On Registration the Zoom Registration Link will be shared by Tuesday, 20<sup>th</sup> July 2021 EOD)</i></p> <p><a href="https://forms.gle/NdtdvTMvmbBN1HLaA">https://forms.gle/NdtdvTMvmbBN1HLaA</a></p>

For any details / clarifications, kindly contact the organisers at [thesocietyofauditors@gmail.com](mailto:thesocietyofauditors@gmail.com) or [admin@casconline.org](mailto:admin@casconline.org) or [acachennaiteam@gmail.com](mailto:acachennaiteam@gmail.com)

\*\*\*\*\*