



SUCCESSION PLANNING

BEYOND WILLS & INHERITANCE

INTESTATE & TESTATE SUCCESSION
& INCOME-TAX ANALYSIS

INCOME TAX EXPERT STUDY GROUP
MEETING 20

OUR LEARNED EXPERT SPEAKERS



Adv. Ankit Goel
Counsel
Shardul Amarchand
Mangaldas



Adv. Sadia Khan
Partner
Shardul Amarchand
Mangaldas



CA. Vinod Jain
Chairman
INMACS Global



CA. Praveen Goyal
Associate Director
Price Waterhouse
& Co. LLP



CA. Baldev Raj
Founder
Baldev Raj & Co.

Saturday | 14:15 HRS - 20:15 HRS | 5th SEPTEMBER

Lecture Room - 1
India International Centre Annexee,
40, Max Mueller Marg
Off Lodi Road
New Delhi, India

REGISTER
NOW

Call us at
+91-97113-10004



PROGRAM SCHEDULE

2:15 PM TO 3:00 PM

Registration & Networking Tea / Coffee

**LIGHTING OF LAMP, SARASWATI VANDANA
& INTRODUCTION TO TOPIC**

3:00 PM TO 4:30 PM

Technical Session I

INTESTATE SUCCESSION Legal Framework & Practical Issues

- Governing succession laws and identification of the applicable personal law
- Hindu, Muslim, Christian and Parsi succession frameworks
- Inheritance of HUF Property
- Inheritance of Ancestral Property
- Rights of legal heirs and coparceners - Rights of Daughter, Wife & Mother
- Succession documentation: Probate, Letters of Administration, Succession Certificate & Legal Heir Certificate
- Mutation and transfer of inherited immovable property
- Transmission of Securities
- Transfer of Bank Balance, FDRs and Other Financial Assets
- Practical issues and complex inheritance scenarios
- Succession of Assets outside India of Resident Indians / Resident of Concerned Countries including Special Issues in US Assets
- Succession of Assets in India by persons resident outside india / foreign citizens



CA. Vinod Jain
Chairman
INMACS Global



PROGRAM SCHEDULE

4:30 PM TO 6:00 PM

Technical Session II

TESTATE SUCCESSION Wills, Executors & Critical Issues

- Essentials and contours of a valid Will
- Authentication, Registration, Witness and matters impacting Validity of Will
- Will, Executor and administration of an estate
- Validity, interpretation and execution of Wills
- Challenges and disputes surrounding Wills
- Testamentary succession involving NRIs and cross-border estates
- Practical case studies and drafting considerations
- Testamentary Succession through Trust Structures
- Specific & Discretionary Trust Structures



Adv. Sadia Khan
Partner
Shardul Amarchand
Mangaldas



Adv. Ankit Goel
Counsel
Shardul Amarchand
Mangaldas

6:00 PM TO 6:30 PM

High Tea & Networking



PROGRAM SCHEDULE

6:30 PM TO 8:00 PM

Technical Session III

INCOME TAX & ALLIED LAWS

Special Relaxations, Precautions & Planning

- Tax treatment of inherited assets
- Cost and period of holding in inherited assets
- Tax implications on subsequent sale of inherited property/securities
- Return filing and disclosure issues following succession
- NRI inheritance — FEMA, repatriation and tax considerations
- Agricultural land, immovable property and financial assets
- TDS and other compliance considerations
- Special relaxations, practical precautions and common pitfalls
- Integrated case studies covering complex estates



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Associate Director
Price Waterhouse
& Co. LLP



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Founder
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8:00 PM TO 8:15 PM

Concluding Session

Vote of Thanks • Vande Matram • National Anthem

KEY THEMES FOR DISCUSSION



- Succession Law
- Wills & Probate
- Estate Administration
- Inheritance Taxation
- NRI Succession
- FEMA
- Immovable Property
- Financial Assets
- Tax Compliance
- Practical Case Studies

The technical framework will cover the principal succession laws, including the Hindu Succession Act, Indian Succession Act, Muslim Personal Law and Special Marriage Act, along with the Transfer of Property Act, Income-tax law and FEMA considerations.

The programme will also focus on the practical succession journey—from identification of the applicable personal law and checking for a Will through asset inventory, identification of heirs, succession documentation, mutation, eventual sale, repatriation and tax return filing.

FORMAT

- Expert Presentations • Interactive Deliberations
- Case Studies • Practical Problem-Solving
- Peer Learning & Networking

Knowledge • Experience • Deliberation • Collaboration

An exclusive collaborative learning forum for leading professionals in Income Tax and Allied Laws.



REGISTER NOW

DELEGATE FEE (incl. 18% GST)



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