

**Campden** Family Connect

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A Patni Family & Campden alliance

In Association with:

**AURTUS**  
CONSULTING



# MASTERCLASS & CO-INVESTMENT WORKSHOP

**15<sup>th</sup> March, 2024 | 3pm to 7pm**

**JW Marriott Hotel New Delhi Aerocity**

*Campden Family Connect - An exclusive network of world's leading families*

**Asset Area 4 - Hospitality District, Delhi Aerocity, New Delhi, India, 110037**

# AGENDA

## ○ REGISTRATION & REFRESHMENTS

## ○ SUCCESSION PLANNING AND FAMILY OFFICE STRUCTURES/SOLUTIONS

In this masterclass, participants will gain invaluable insights and expert guidance on:

### ● Importance of the organised succession planning framework

- Control over wealth / enterprises, coupled with flexibility of asset & income up-streaming.
- Discussion on wills vs trust.
- Ring-fencing of wealth against any potential liability arising out of business.
- Creating cohesive environment within the family and avoiding possibilities of family disputes.
- Providing clarity amongst the family members vis-à-vis family wealth without actually distributing the wealth to respective family members.

### ● Various aspects, constituents and analysis of trust deed

- Providing maintenance and safety mechanism for family members.
- Setting up framework for decision-making, dispute resolution and overall management and succession of businesses.
- Defining roles and responsibilities for family administration and wealth allocation / management.
- Creating rules and regulations for the family and family wealth including behavioural aspects for the family.

**Vishal Gada**, Founder & CEO, **Aurtus Consulting**

**Zeel Jambuwala**, Partner & Co-founder, **Aurtus Consulting**

## ○ TEA / COFFEE BREAK

## ○ CO-INVESTMENT WORKSHOP

An interactive workshop bringing together family principals, nextgens and private investors looking to co-invest with like-minded peers. The workshop provides:

- Peer to peer connectivity and information exchange with like-minded investors
- Discreet access to off-market and member backed deals

## ○ NETWORKING OVER DRINKS

## SPEAKER PROFILES

**Vishal Gada***Founder & CEO*  
**Aurtus Consulting**

Vishal has over 20 years of experience in advising clients on tax and regulatory domain. Prior to founding Aurtus Consulting, he was a Partner at KPMG and also one of the co-founders of Dhruva Advisors. He has been recognized as one of India's top tax professionals by International Tax Review for the years 2019, 2020. He has worked on numerous complex M&A transactions, Corporate reorganizations, and regulatory issues. His area of expertise also includes devising succession structures, advising on domestic /international tax issues and structures for inbound and outbound investments.

Vishal has co-authored couple of books on professional subjects and is a regular speaker at various professional forums. He has also been part of various professional committees, namely, International Tax Committee of Bombay Chartered Accountants Society and Chamber of Tax Consultants as well as the Research & Publication Committee of Western India Regional Council of the Chartered Accountants of India. Vishal is an avid reader, a music enthusiast and writes regularly on social blogs. He is a qualified Chartered Accountant and has completed the "Business Consultancy Studies" course conducted by Jamanalal Bajaj Institute of Management Studies jointly with the Bombay Chartered Accountants' Society. He also holds a Bachelor of Laws degree.

**Zeel Jambuwala***Partner &  
Co-founder*  
**Aurtus Consulting**

Zeel has over 12 years of experience in advising clients in tax and regulatory domain. She is a Chartered Accountant and holds a Bachelor degree in Law and Commerce. Prior to joining Aurtus Consulting, she has worked with Dhruva Advisors and KPMG. She has worked on several M&A transactions, corporate re-organizations, and corporate tax issues. Her area of expertise also includes, devising family succession structures, advising on domestic /international tax transactions, fund set-up and regulatory issues. She has worked across industry sector like infrastructure, pharmaceutical, technology, start-ups and financial services. Zeel has co-authored various articles on tax topics and chapters in prominent tax journals. In her free time, Zeel likes travelling, reading and trying new recipes.

# CAMPDEN FAMILY CONNECT MEMBERSHIP

Campden Family Connect is a pre-eminent global membership network for India's Ultra-high Net Worth community, Family Business Owners and their Family Offices. Founded 2016, Campden Family Connect is the first of its kind venture between RAAY - Mr. Amit Patni Family Office, Arianth Patni and Campden Wealth UK in the family office and family business space.

Delivering both local and global networking opportunities, Campden members are supported by globally flavoured initiatives in the form of knowledge forums, pioneering research work, progressive publication material and advanced education programs. By joining the Campden Family Connect, you gain the following benefits:

- You become a part of the global community of over 1400 family business owners, single family office principals, CIOs and large private investors
- Access to unrivalled knowledge & intelligence platform
- Proprietary research reports
- Webinars/ online communication with members around the world
- Member events, private briefings and tailored introductions to families
- Co-investment workshops and off-market proprietary deal flows
- Multi-generational education programs

To know more, write to [info@campdenfamilyconnect.com](mailto:info@campdenfamilyconnect.com)

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