



CHARTERED TRUST AND ESTATE PLANNER CURRICULUM



• UNIT 1- INTRODUCTION TO ESTATE PLANNING

- ✓ **Introduction to Estate Planning**
- ✓ **Estate Planning Process**
- ✓ **Goal Setting**
- ✓ **The Basic Tools of Estate Planning**
- ✓ **Business Succession Planning**
- ✓ **Philanthropy and Charitable Planning**



• UNIT 2 - PERSONAL & INTESTATE SUCCESSION LAWS IN INDIA

✓ Introduction to Personal and Intestate Succession Laws in India

✓ Indian Succession Act, 1925

✓ Hindu Succession Act

✓ Coparcenary Property Under HSA

✓ Succession in Case of Males Under HSA

✓ Succession in Case of Females Under HSA/li>

✓ Minority and Guardianship Act 1956/li>

✓ The Hindu Adoption and Maintenance Act, 1956

✓ Mitakshara and Dhayabaga Schools of Hindu Law

✓ Muslim Law

✓ Gifts Under Muslim Law

✓ Wakfs Under Muslim Law

✓ Goa Civil Code



• UNIT 3 - TESTAMENTARY SUCCESSION

✓ **Wills and Succession Planning**

✓ **Wills Under ISA**

✓ **Wills (Wasiyat)**

✓ **Transfer of Property**

✓ **HUF**



• UNIT 4 - TRUST PLANNING IN INDIA

- ✓ Trust
- ✓ Trust for Un-Born Person
- ✓ Trust for Wife, Children and Other Relatives
- ✓ Oral Trust
- ✓ Private Religious Trust
- ✓ Discretionary Trust
- ✓ Living Trust
- ✓ Religious and Charitable Trusts
- ✓ 100 per cent Specific Beneficiary Trust
- ✓ Private Business Trust
- ✓ Society as a form of charitable Organization



• UNIT 5 - INTERNATIONAL ESTATE PLANNING

- ✓ Estate Planning in Singapore
- ✓ Estate Planning in the UK
- ✓ Estate Planning in the US
- ✓ Estate Planning in the UAE
- ✓ FEMA Regulations in Estate Planning



• UNIT 6 - LAWS AFFECTING ESTATE PLANNING

- ✓ Introduction to Law
- ✓ Meaning and Essentials of a Contract
- ✓ Law of Agency
- ✓ Formation of Companies
- ✓ Various Acts
- ✓ Anti-Money Laundering
- ✓ Hindu Personal Law
- ✓ Muslim Personal Law



INFILY FEES

Instructor : Rahul Agarwal (CFP,CTEP)

Classes Mode :- Online Live Classes On Zoom App



Content Provided :-

- **Physical Books**
- **PPT's**
- **Question Bank**
- **Recording of Every Classes**

Course Duration : 3 Months

Classes Day and timings : Wednesday & Friday 07.00 A.M. (2 hrs.)

Tuition Fees : 30,000/- Payable in 3 Instalments

- **1st Month Instalment- 10,000/-**
- **2nd Month Instalment- 10,000/-**
- **3rd Month Instalment - 10000/-**

