

<b>Event Name</b>	Workshop-Finance Department
<b>Topic:</b>	Legal Perspectives of Estate Planning
<b>Date: (DD/MM/YYYY)</b>	13th March 2024
<b>No. of Days:</b>	1 hour
<b>Start Time:</b> <b>End Time:</b>	02:10 PM - 03:10 PM
<b>Venue Campus Name &amp; Place:</b>	Seminar Hall – 3,CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru – 560009.
<b>Section/Semester:</b>	NA
<b>Batch:</b>	NA
<b>Mod of Event Offline/ Online (Provide Virtual Link)</b>	Offline
<b>Name of Chief Guest/Dignitaries/Speaker:</b>	Mr. B N Mallikarjun
<b>Chief Guest/Dignitaries/Speaker Designation:</b>	Retired Additional Judge
<b>Chief Guest/Dignitaries/Speaker Contact No &amp; Email Id:</b>	<a href="mailto:arjun2008v2@gmail.com">arjun2008v2@gmail.com</a> +91 9900600555
<b>Chief Guest/Dignitaries/Speaker Company/ Institute Name:</b>	High court Karnataka
<b>Event Coordinators Name &amp; Contact No.</b>	Dr. Shalini R - 9845990070 Dr. Premalatha K P - 8123988440
<b>Collaboration &amp; Association (Company Name,</b>	NA
<b>Moderator (if any)</b>	NA
<b>No. of Participants</b>	27
<b>Professional Photographer Name &amp; Contact No.:</b>	NA
<b>Feedback:</b>	Yes
<b>Brochure/Poster: (if any)</b>	Yes
<b>Budget of the Program (if any):</b>	Yes
<b>Revenue Collected: (if any)</b>	NA

**1. Introduction:**

Estate planning involves the process of arranging and managing an individual's assets during their lifetime and after death. From a legal perspective, estate planning encompasses the creation of wills, trusts, powers of attorney, and other documents to ensure the orderly distribution of assets and the fulfillment of the individual's wishes. It also involves considerations of tax implications, healthcare directives, and guardianship arrangements. Understanding the legal aspects of estate planning is crucial for individuals and families to protect their assets and ensure their legacy is preserved according to their intentions.

**2. Program Objectives:**

- Creation of will or trust
- Creation of powers of attorney
- Designating beneficiaries for financial benefits

**3. Relevance to PO, Relevance to PEO and PSOs**

PO	Program Objective (PO)
PO1	Apply knowledge of management theories and practices to address and resolve business challenges
PO2	Demonstrate analytical and critical thinking abilities for information-based decision making
PO3	Analyse global, economic, legal and ethical aspects of business
PO4	Apply trans-disciplinary tools and techniques towards effective problem solving
PO5	Assist others and self in accomplishing organizational objectives and contribute effectively to a collaborative team setting.
PO6	Exhibit an entrepreneurial mind-set for the establishment of sustainable businesses and societies.
PO7	Exemplify value-based leadership for excellence

**4. Activity Overview:**

In the realm of legal perspectives on estate planning, the process involves several key activities. Initially, there's a thorough assessment of the individual's assets, liabilities, and overarching goals to establish the objectives of the estate plan. This is followed by the meticulous preparation of legal documents such as wills, trusts, powers of attorney, and advance directives, tailored to the individual's preferences and complying with legal requirements. Asset protection strategies are then implemented to shield assets from creditors, minimize estate taxes, and facilitate smooth transfer to designated beneficiaries.

**5. Guest/Speakers' Profile:**

Mallikarjuna R.M is a highly qualified and experienced legal professional based in Bangalore, India. With a background including an LLM from Bangalore University, certification in Cyber Law, and extensive practice as an advocate specializing in Civil, Criminal, and Family matters,

Mallikarjuna brings a wealth of legal expertise to the table. His career journey spans various roles, from practicing as an advocate to serving as a Civil Judge and Judicial Magistrate, and currently practicing law while also imparting knowledge as a part-time lecturer at KLE Law College. Mallikarjuna's achievements include winning awards such as the Best Mooter award and securing a rank in the Karnataka State Judiciary Exam. His skills in communication, organization, and management, along with his dedication and optimism, make him a valuable asset in the legal profession.



**Guest profile.pdf**

**6. Summary and Key Learnings of the session:**

After attending the session on the creation of wills or trusts, powers of attorney, and designating beneficiaries for financial benefits, the key takeaways include understanding the importance of estate planning tools such as wills and trusts in ensuring the orderly distribution of assets after death. Additionally, learning about powers of attorney highlights the significance of appointing trusted individuals to make financial and medical decisions on one's behalf if incapacitated. Designating beneficiaries for financial benefits underscores the need to carefully choose individuals who will receive assets or benefits according to one's wishes, emphasizing the importance of clarity and documentation in estate planning processes.

**7. Participant details:** All the Faculties of CMS Business School, Jain University.

**8. Details of Winners (if applicable):** -NA

**9. Details of the judges (if applicable):** -NA

**10. Attendance records:**



Attendance Sheet

Agenda/ Subject:		Finance Seminar- Legal Perspectives on Estate Planning	Venue: Seminar Hall-3	Date: 13/03/2024	☺ - IC Time: 6:30 PM
Sl. No.	Title	Faculty Name	Designation	Department	Signature
1	Dr.	Harold Andrew Patrick	Professor & Dean - Academics	OB and HRM	
2	Dr.	Abhinav Tiwary	Assistant Professor	Decision Science	
3	Dr.	Amudha Sivanandam	Professor	Finance	
4	Dr.	Anantha Subramanya Iyer K N	Associate Professor	Marketing	
5	Dr.	Anitha Nallaswam	Programme Coordinator - Professor	Marketing	
6	Dr.	Anurag Jain	Assistant Professor	Marketing	
7	Dr.	Avinash Rana	Associate Professor	Business Analytics	
8	Dr.	Batani Raghavendra Rao	Professor	Finance	<i>[Signature]</i>
9	Dr.	Balaji Gopalan	Assistant Professor	Decision Science	
10	Dr.	Chaya Bagrecha	Area Head- Professor	Finance	
11	Dr.	Dhilipan C	Assistant Professor	Finance	
12	Dr.	Dinesh Neelakanta Rao	Area Head - Associate Professor	OB and HRM	
13	Dr.	Gayathri R	Programme Coordinator-Assistant Professor	OB and HRM	
14	Dr.	Geeti Sharma	Associate Professor	Finance	<i>Geeti</i>
15	Dr.	Gopalakrishnan Chinnasamy	Associate Professor	Finance	<i>Gok</i>
16	Mr.	Harshith K M	Assistant Professor	General Management	
17	Dr.	Hemanth Kumar S	Professor	Marketing	
18	Dr.	Inam Khan	Assistant Professor	General Management	
19	Dr.	Jaykumar Padmanabhan	Area Head-Associate Professor	Decision Science	
20	Dr.	Kalavathy	Associate Professor	Marketing	
21	Mr.	Karthik Kudukul	Assistant Professor	Aviation	
22	Dr.	Kiran Kumar M	Assistant Professor	Finance	<i>[Signature]</i>

Sl. No.	Title	Faculty Name	Designation	Department	Signature
23	Dr.	Krishna Koppa	Associate Professor	Marketing	
24	Dr.	Kumar Mukul	Area Head-Professor	ENVC	
25	Dr.	L Sudarshan Reddy	Programme Coordinator-Professor	Decision Science	
26	Dr.	Lakshmi Sevukamoorthy	Assistant Professor	Business Analytics	<i>[Signature]</i>
27	Dr.	Lourden Selvamani	Assistant Professor	Finance	<i>[Signature]</i>
28	Dr.	M K Lodi	Adjunct Faculty	General Management	<i>[Signature]</i> 13/3
29	Dr.	Lubna Ambreen	Area Head - Associate Professor	Family Business Management Area	
30	Dr.	M Govindraj	Associate Professor	Marketing	
31	Dr.	M H Sharieff	Professor of Practice	Marketing	
32	Dr.	Madhavi R	Programme Coordinator-Professor	Finance	
33	Dr.	Mahalakshmi S	Assistant Professor	Marketing	
34	Dr.	Mansi Kukreja	Professor	Finance	<i>[Signature]</i> Mansi
35	Dr.	Manita D Shah	Professor	Finance	<i>[Signature]</i> MS
36	Ms.	Minerva Das	Assistant Professor	General Management	
37	Dr.	Monoo John	Area Head-Associate Professor	OB and HRM	
38	Dr.	Moovendhan	Associate Professor	Business Analytics	
39	Dr.	Nalini Sunil M	Assistant Professor	OB and HRM	<i>[Signature]</i>
40	Dr.	Navanaetha Kumar V	Area Head-Professor	Decision Science	
41	Mr.	Naveen Kumar V	Assistant Professor	Business Analytics	
42	Dr.	Neena P C	Associate Professor	OB and HRM	
43	Dr.	Pradeep Kumar R	Assistant Professor	General Management	
44	Dr.	Praveen Gujjar	Area Head-Associate Professor	Business Analytics	
45	Dr.	Premalatha K P	Assistant Professor	Finance	<i>[Signature]</i>
46	Dr.	Pojari Sudharshana Reddy	Assistant Professor	Finance	<i>[Signature]</i>
47	Dr.	Pundareeka Vittala	Professor	Finance	<i>[Signature]</i>
48	Mr.	Rahul Gupta	Adjunct Faculty	Marketing	<i>[Signature]</i>

Sl. No. Title  
49



Sl. No.	Title	Faculty Name	Designation	Department	Signature
49	Dr.	Raja Sankaran	Associate Professor	Marketing	
50	Dr.	Rashmi Akshay Yadav	Assistant Professor	Finance	<i>Rashmi S</i>
51	Dr.	Rupesh Kumar Sinha	Associate Professor	Decision Science	
52	Dr.	Ravishankar S Uffe	Assistant Professor	Decision Science	
53	Dr.	Salma Begum	Programme Coordinator-Assistant Professor	General Management	
54	Dr.	Sangeeta Dewanathan	Area Head-Associate Professor	Marketing	
55	Dr.	Sanjana Samaddar	Associate Professor	Marketing	
56	Dr.	Sarangapani Nivarthi	Associate Professor	General Management	
57	Dr.	Satish Kumar R	Adjunct Professor	Marketing	
58	Dr.	Satyajeet Nanda	Associate Professor	OB and HRM	
59	Dr.	Saurabh Srivastava	Associate Professor	Marketing	
60	Dr.	Selvi S	Associate Professor	Finance	
61	Dr.	Shaji Thomas	Professor	Finance	
62	Dr.	Shakala Banu C	Associate Professor	General Management	
63	Dr.	Shalini R	Associate Professor	Finance	<i>Shalini R</i>
64	Dr.	Shalini	Area Head-Assistant Professor	General Management	<i>Shalini</i>
65	Dr.	Shalghya Sharma	Assistant Professor	ENVC	
66	Dr.	Sharat Kumar	Associate Professor	Marketing	
67	Dr.	Shashank M Hiremath	Associate Professor	Finance	<i>Shashank</i>
68	Dr.	Shrinivas Patil	Professor	Finance	<i>Shrinivas</i>
69	Dr.	Sreetha Nanduri	Assistant Professor	Finance	
70	Dr.	Smita M Galkwad	Assistant Professor	Marketing	
71	Mr.	Somasundaram G	Professor of Practice	Aviation and Aerospace Management	
72	Dr.	Sumbul Sanveen	Assistant Professor	General Management	
73	Dr.	Dr. Sudindra V R	Assistant Professor	Finance	<i>Sudindra V R</i>





Sl. No.	Title	Faculty Name	Designation	Department	Signature
74	Dr.	Syed Shahid Raza	Assistant Professor	Business Analytics	
75	Dr.	Yoganathan S	Assistant Professor	Decision Science	
76	Ms.	Suparna Ghosal	Adjunct Faculty	Marketing	
77	Dr.	Syed Kazim	Associate Professor	General Management	
78	Mr.	Thomas P K	Adjunct Faculty	ENVC	
79	Dr.	Trupti Dandekar Humnekar	Associate Professor	Marketing	
80	Dr.	Lima Warriar	Professor	OB and HRM	
81	Dr.	Lima C Swadimath	Professor	General Management	
82	Dr.	V Y John	Assistant Professor	Finance	<i>[Signature]</i>
83	Mr.	Vaibhav Goutham Suresh	Chief - Industry Liasion( Deputy Director-In Charge)	Aviation and Aerospace Management	
84	Dr.	Vedantam Seetha Ram	Associate Professor	Finance	
85	Dr.	Vijayalakshmi P	Associate Professor	ENVC	
86	Dr.	Vijaya G S	Programme Coordinator-Professor	Decision Science	
87	Dr.	Vinayak Anil Bhat	Associate Professor	OB and HRM	<i>[Signature]</i>
88	Dr.	Vinoth S	Programme Coordinator-Professor	Finance	<i>[Signature]</i>
89	Dr.	Vinoth Kumar V	Assistant Professor	Decision Science	
90	Dr.	Vishal Soodan	Assistant Professor	Marketing	
91	Dr.	Umesh Chandra	Assistant Professor	Marketing	
92	Dr.	Urmila Itam	Assistant Professor	OB and HRM	
93	Dr.	Yavana Rani S	Associate Professor	Decision Science	
94	Mr.	Ajith Kumar M	Research Assitant	Research House	
95	Ms.	Anshika Jain	Research Assitant	Finance	<i>[Signature]</i>
96	Mr.	Bharath H	Teaching Assitant	Marketing	
97	Mr.	Chinmayaaditya	Research Assitant	Decision Science	
98	Ms.	Christina Sophia	Teaching Assitant	OB and HRM	

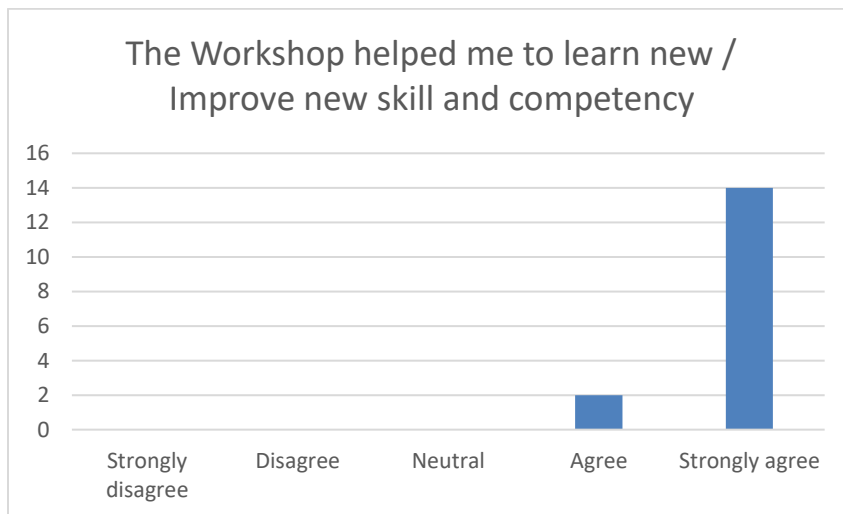
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Sl. No.	Title	Faculty Name	Designation	Department	Signature
99	Ms.	Deepthi S Pawar	Research Assitant <i>H. Ranjitha S</i>	ENVC	
100	Ms.	Ishita Gopi	Teaching Assistant	General Management	
101	Ms.	Jyothi M	Teaching Assistant	Finance	
102	Ms.	Keerthana A R	Teaching Assistant	Marketing	<i>Keerthana</i>
103	Ms.	Nikitha K	Research Assitant <i>H. Ranjitha S</i>	Business Analytics	
104	Ms.	Priyamvatha	Teaching Assistant	Research House	
105	Mr.	Sai Ramakanth	Research Assitant <i>H. Ranjitha S</i>	OB and HRM	
106	Mr.	Thilak Reddy C	Research Assitant <i>H. Ranjitha S</i>	Decision Science	
107	Ms.	<i>Ranjitha H.S</i>	<i>Admin Executive</i>	<i>Administration</i>	<i>H.S</i>
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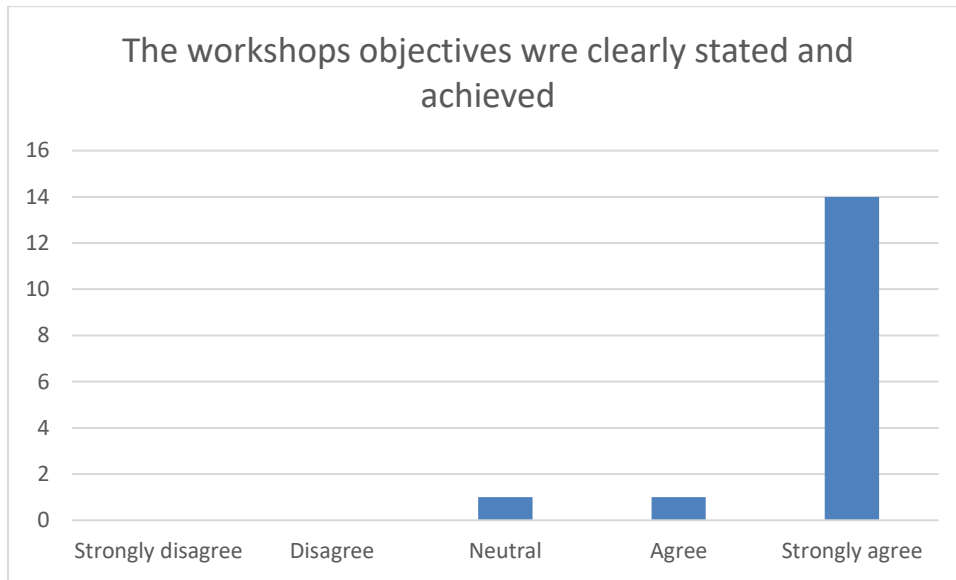
finance seminar  
attendance.pdf

**11. Participants' Feedback, Feedback Analysis, and Attainment Calculation: (if Applicable)**

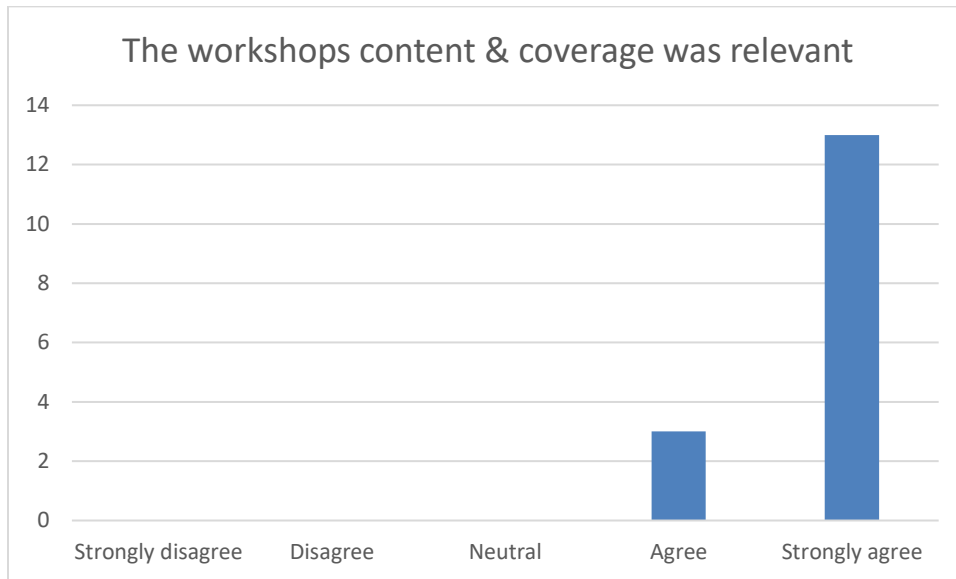




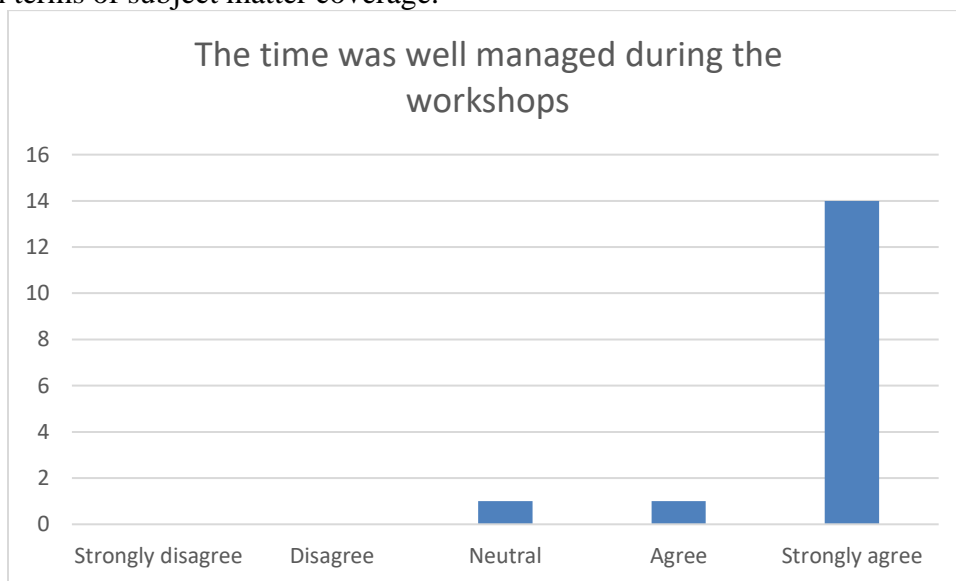
The responses "Agree" and "Strongly agree" from participants indicate that the workshop was successful in facilitating the learning and improvement of new skills and competencies. This feedback suggests that the workshop was perceived as valuable and effective in enhancing participants' abilities or knowledge in a specific area. The predominance of "Strongly agree" responses highlights a strong positive impact and substantial skill development or acquisition resulting from the workshop.



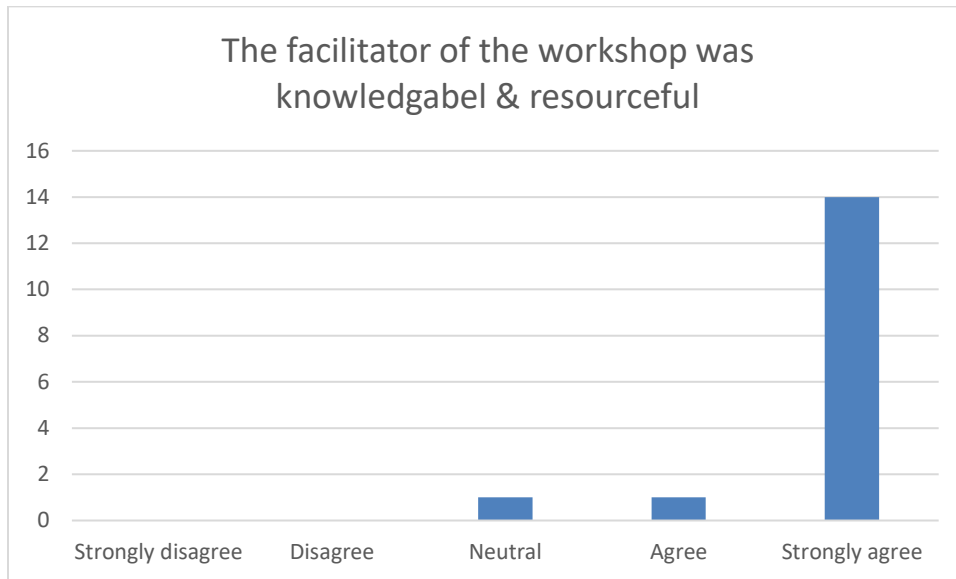
From the participants' responses, it is evident that the workshop's objectives were clearly stated and successfully achieved. The overwhelming number of "Strongly agree" responses indicates a strong consensus among participants that the workshop effectively communicated its objectives and met them satisfactorily. The presence of "Agree" and "Neutral" responses also suggests general agreement with the clarity and achievement of the workshop's goals, although to a slightly lesser extent compared to the "Strongly agree" responses.



The majority of participants strongly agreed that the content presented in the workshop was pertinent and comprehensive. The presence of some "Agree" responses further supports the notion that the workshop effectively addressed relevant topics. Overall, the feedback indicates that participants found the content of the workshop to be both relevant and comprehensive, meeting their expectations and needs in terms of subject matter coverage.



The high number of "Strongly agree" responses indicates a strong consensus that the workshop effectively utilized time and kept sessions on track. The presence of "Agree" and "Neutral" responses suggests general agreement with the time management but with a few participants expressing a more neutral stance. Overall, the feedback reflects that the majority of participants felt that the time allocation and management during the workshops were satisfactory and conducive to a productive learning experience.



Based on the responses from participants, it is clear that the facilitator of the workshop was highly regarded as knowledgeable and resourceful. The overwhelming number of "Strongly agree" responses indicates a strong consensus among participants that the facilitator possessed the necessary expertise and resources to effectively lead the workshop. The presence of "Agree" and "Neutral" responses further supports this perception, with a few participants expressing a more neutral stance possibly due to varying levels of interaction or experience with the facilitator. Overall, the feedback indicates that the facilitator was well-received and viewed positively in terms of their knowledge and resourcefulness during the workshop.



Feedback.xlsx

**12. Proposals for the Event/Programme:**

To,

The Programme Coordinator for kind approval,

**Sub:** Workshop on Legal Perspectives of Estate Planning

The purpose of the guest lecture is to provide specific inputs and exposure from a practitioner’s perspective on select concepts in Legal Perspectives of Estate Planning. The lecture has been planned for one hour. The planned program duration will be during 02:10 PM to 03:10 PM on 13<sup>th</sup> March 2024.

Respected Programme Coordinator your kind approval is requested for the conduct of the same.

The Dean has recommended this proposal.

Kind Regards,

Faculty Coordinator  
Finance Area  
Signature

Program Coordinato  
Approval Authority  
Signature

**13. Minutes of Meetings:**

<b>Meeting Title</b>	Workshop - Legal Perspectives of Estate Planning	
<b>Date of Meeting</b>	03/03/2024	
<b>Meeting Venue</b>	LH:201	
<b>Meeting Agenda</b>	Confirming Resource Practitioner	
<b>In Attendance</b>	<b>Name</b>	<b>Title/Department/Organization</b>
1	Dr. Shalini R	Associate Professor/Finance Area
2	Dr. Premalatha K P	Assistant Professor/Finance Area
<b>Key Meeting Outcomes</b>		
	<ul style="list-style-type: none"> <li>• A telephonic communication and confirmation to be obtained from Mr. B N Mallikarjun - Retired Additional Judge of High court Karnataka.</li> <li>• Meeting was planned with the team and date was finalized for the session.</li> </ul>	
<b>Action Plans, if any (along with the First Person Responsible)</b>		
	<ul style="list-style-type: none"> <li>• Dr.Shalini R &amp; Dr. Premalatha K P - agreed to do the needful..</li> </ul>	

**14. Budget: -**

To,

The Directors/ Dean for kind approval

**Sub:** Budget for “Workshop - Legal Perspectives of Estate Planning”

The **Finance Department** is organizing Workshop - Legal Perspectives of Estate Planning on **13<sup>th</sup> March 2024**, in Seminar Hall-03, Faculty of Management Studies, JAIN (Deemed-to-be University), Bengaluru

The following are the requirements for the same:

Sl. No.	Details	Amount (₹)
1	Honorarium to Resource Person	5,000
	TOTAL	5,000

Total in Words: Rupees Five Thousand Only.

Director/Dean, kind approval is requested for conducting the ‘Workshop - Legal Perspectives of Estate Planning’, and incurring the expenses Five Thousand Only towards the same.

The Dean has recommended this proposal.

Kind Regards,

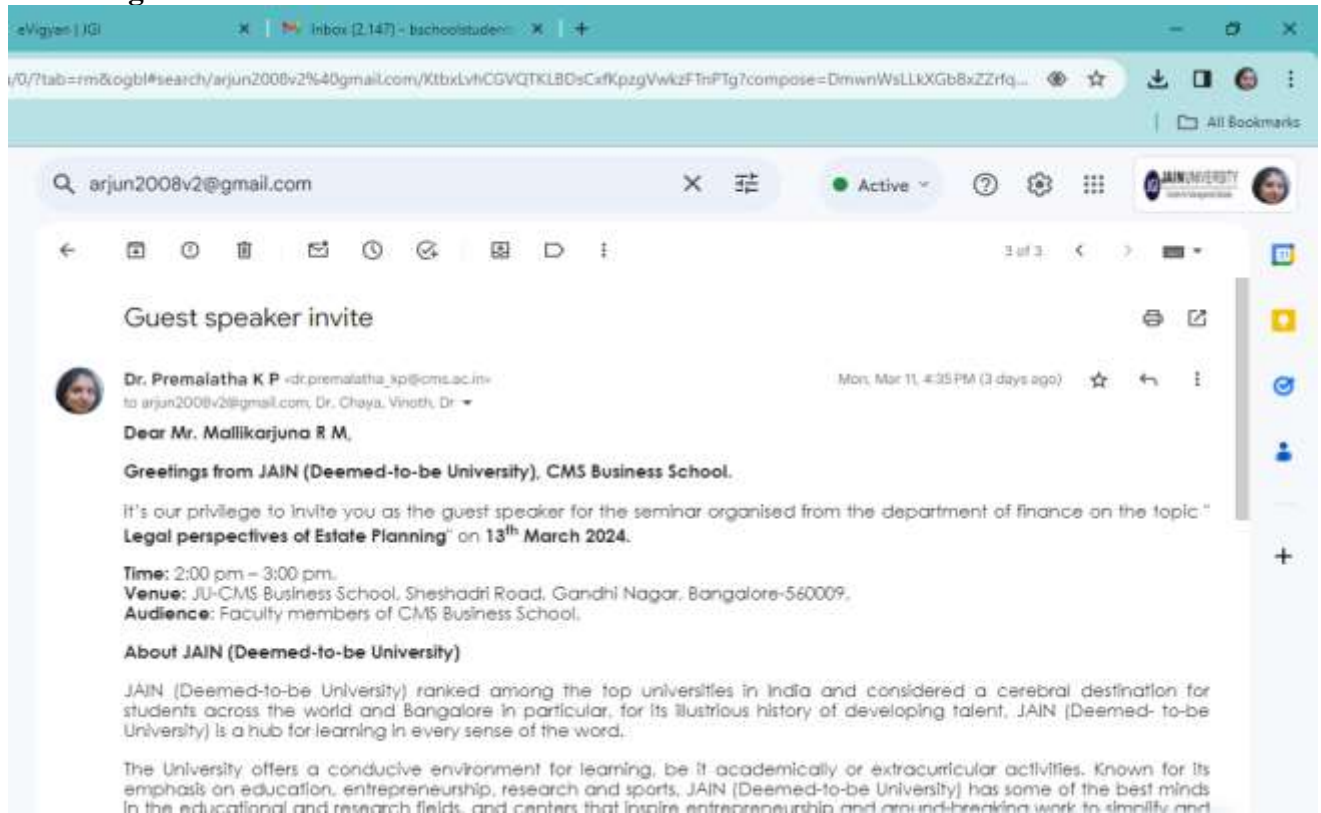
Faculty Coordinator  
Finance Area  
Signature

Dean  
Approval Authority  
Signature



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2024 12-21 PM.jpg

## 15. Trailing Emails/communications:



## 16. Brochure/Poster:





**Mr. B N Mallikarjuna**  
High court advocate



March 13<sup>th</sup>, 2024



02:10 PM - 03:10 PM



Seminar Hall - 3

**Focus Points:**

- Creation of will or trust
- Creation of powers of attorney
- Designating beneficiaries for financial benefits

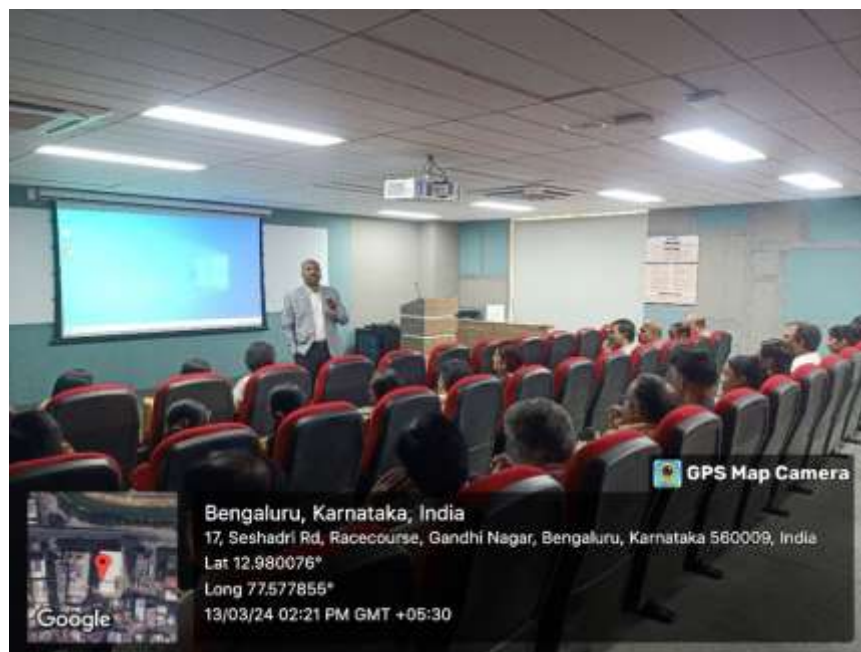
**Cohort Profile:** Faculty members

**Coordinators:** **Dr. Shalini R**  
Associate Professor  
**Dr. Premalatha K P**  
Assistant Professor

**17. Pictures for the Event:**



**Fig 1: Resource Person: Mr. B N Mallikarjun; Event: Workshop; Date: 13.03.2024; Venue: SH-03, CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru – 560009.**



**Fig 2: Resource Person: Mr. B N Mallikarjun; Event: Workshop; Date: 13.03.2024; Venue: SH-03, CMS Business School, Sheshadri Road, Gandhi Nagar, Bengaluru – 560009.**