



## R.V. Institute of Management

CA-17, 26<sup>th</sup> Main, 36<sup>th</sup> Cross, 4<sup>th</sup> "T" Block, Jayanagar, Bangalore-560041

Guest Lecture organized for 2nd semester MBA(2021-23) students on 28<sup>th</sup> September, 2022 by Centre for Career Development . Resource person was Mr. Vijay Upendra, Consultant, Propseva , Bengaluru on the topic "Estate Planning "

Date: September 28 <sup>th</sup> 2022	Venue: Seminar Hall
	To : --2 <sup>nd</sup> Semester MBA students
No. of Participants: 122	Event Coordinator: Prof. Payal Jindal

**Objectives: To facilitate the students to know about importance of Estate Planning**

**Mr. Vijay Upendra, Consultant, Propseva , Bengaluru delivered guest lecture on the topic "Estate Planning "**

He said "In the past, a self-made Estate Plan could have worked, in this digital era that we are living in, it is not prudent for a person to make their own Estate Plan and it is highly advisable to seek the help of a profession".

**Gist of the Guest Lecture:**

- ❖ Estate Planning is for all, not only for the wealthy. It does not matter how much you have. What matters is how your assets, whatever you have, will pass on to the person of your choice.
- ❖ Estate Planning simplifies inheritance and enables the distribution of one's assets to the intended persons.
- ❖ A Power of Attorney allows you to delegate your right to manage, invest, and spend assets held in your individual name to someone else, called your attorney in fact.
- ❖ Generally, any individual can create a power of attorney if over 18 years of age, a resident of the state in which it is created, and legally competent. This, however, varies from state to state.
- ❖ The term "probate" means the process of legally establishing the validity of a Will.
- ❖ A trustee is an individual or institution with legal authority to manage the trust property and assets on behalf of the settlor to benefit the beneficiary. They have complete control over the trust assets until they get transferred to the beneficiary.

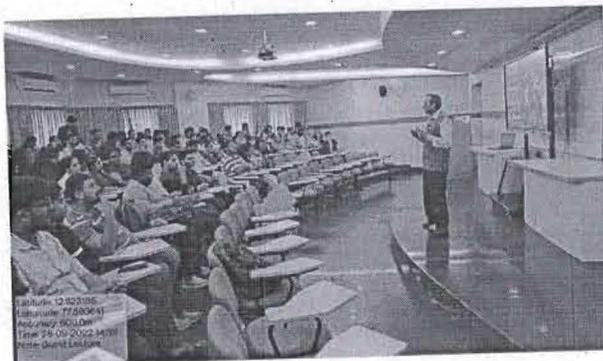
**Take away from the session :**

This Guest lecture aimed to bring awareness regarding Estate planning which is most essential for present scenario.

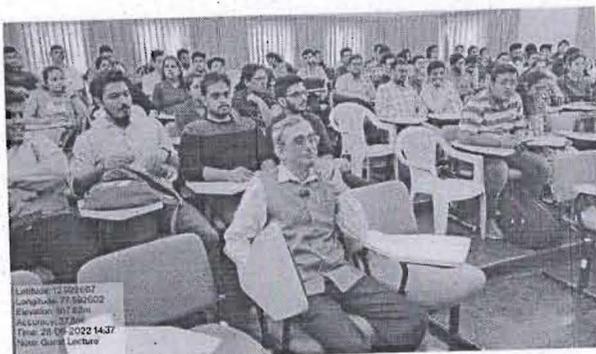
**Feed back of the students:** All participants appreciated the session and wished to have more and more sessions like this to share minute details pertaining to "Estate Planning"

*Payal Jindal*  
**Prof. Payal Jindal**  
**Centre for Career Development**

**Dr. Purushottam Bung**  
**Director-RVIM**



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27-09-2022

To,  
The Director,  
RV Institute of Management  
Bangalore-41

Respected Sir,

**Request for approval for inviting the Guest speaker Mr. Vijay Upendra for the Guest lecture for the 2<sup>nd</sup> semester MBA students on the topic Estate Planning.**

Centre for Career Development plans to organize a guest lecture by **Mr. Vijay Upendra , Consultant at PropSeva for the 2<sup>nd</sup> semester MBA students on the topic Estate Planning on September 28<sup>th</sup> 2022 between 2.30 pm to 3.30 pm .**

We request your approval for inviting the guest

**Enclosed is the profile.**

Thanking you,  
Yours Faithfully.

*Payal Jindal*  
Payal Jindal

*Approved*  
*[Signature]*  
*07/10*

## Contact

[www.linkedin.com/in/vijay-upendra-349ab924](https://www.linkedin.com/in/vijay-upendra-349ab924) (LinkedIn)

## Top Skills

Insurance

Health Insurance

Relationship Management

# vijay upendra

Consultant Estate/Succession Planning at PropSeva  
Bengaluru, Karnataka, India

## Experience

PropSeva

Consultant Estate/Succession Planning  
January 2019 - Present (3 years 10 months)  
Bengaluru, Karnataka, India

Wills, Trust & Power of Attorney.

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## Education

Bangalore University

B.COM, Accounts & Economics

RV Institute of Management  
Guest lecture on Estate Planning by Mr. Vijay Upendra , Consultant on 28th Septemebr 2022

Sl.no	Name	Section	Signature
1	CHAITANYA KAMATAGI B	A	KPMG
2	AKASH RACHAPPA KHANAGAVI	A	KPMG
3	SHETTY TRUPTHI CHANDRAHAS	A	Present
4	HARSHITHA SRINIVAS	A	ABSENT
5	SAGI SAMPI	A	Present
6	PAULOMEE BARUAH	A	Present
7	NEETHA KAMATH	A	Present
8	ADITYA UDAY HEGDE	A	Aditya
9	SHREYAS G A	A	Shreyas G A
10	SRUJANA S	A	Present
11	PRAJWAL S N	A	Present
12	SUCHITRA G	A	Suchitra
13	SANKET SURESH SHIRSAT	A	Present
14	ANIKET SANJAY REVANKAR	A	Aniket
15	M LUQMAN NAWAZ	A	M Luqman Nawaz
16	MADHURA A	A	ABSENT
17	H V SHREEVATSA	A	H V Shreevatsa
18	LILIMA DASH	A	Lilima Dash
19	KUMAR ASHUTOSH	A	Kumar Ashutosh
20	RAHUL S SANGOLLI	A	Rahul S Sangolli
21	GIRISH N NASHI	A	Present
22	ANKITA GAJANAN NAIK	A	Ankita
23	GURUBASAVARAJ K M	A	Present
24	LIKHITHA L	A	Likhitha L
25	RAHUL RAM BHAT	A	Present
26	AMIT KAMADOLLISHETTARU	A	KPMG
27	POOJARANI TALAWAR	A	Poojarani
28	ABHITHA K	A	Abhitha
29	ABHISHEK SHENOY	A	ABPMG
30	DEEPAK GIRISH KALYANI	A	Deepak
31	ISAAC JESSE K	A	Present
32	VINAYAK RAO GAIKWAD K	A	Present
33	SUTOPA DEB	A	Present
34	BHASKARA PRABHU	A	Present
35	PRAKASH SHIVAKUMAR	A	KPMG
36	AKANKSH K G	A	KPMG
37	BERNARD FERNANDES	A	Present
38	VIOLA PINTO	A	Present
39	VARSHA	A	KPMG
40	GAGANDEEP V N	A	Gagandeep V N
41	ANUSHA	A	Anusha
42	KAVYAPRIYA J	A	Present
43	BASAVARAJ	A	Present
44	ANVITH KUMAR	A	Present
45	DESAI JATIN ARUN	A	Present
46	NAYAN KUMAR	A	Present
47	DINAH NEETHA NORONHA	A	Present
48	CHETAN SINGH M	A	Chetan

44	ANVITH KUMAR	A	Present
45	DESAI JATIN ARUN	A	<del>Desai</del>
46	NAYAN KUMAR	A	Present
47	DINAH NEETHA NORONHA	A	Present
48	CHETAN SINGH M	A	Present
<del>49</del>	KAUSTUBH LACHAPPANAVAR	A	Present
<del>50</del>	KSHITIJ P L	A	Devi hij Pi
<del>51</del>	BHUVANES P	A	P. Bin
52 X	KOKILA K	A	ABSENT
<del>53</del>	M M JABEZ	A	<del>Jab</del>
<del>54</del>	KALAVALA ABHISHTA	A	Present
<del>55</del>	KAPARTHI BHAVANA	A	Present
<del>56</del>	HEMA S	A	Present
<del>57</del>	RAMANABOINA ANAND KUMAR	A	Present
<del>58</del>	SNEHA U	A	<del>Sneha</del>
59 X	D SURIYA PRIYASREE	A	ABSENT
60 X	TEJAS N	A	ABSENT
1 X	AISHWARYA G	B	Aishu
<del>2</del>	SUPRIYA GOVIND BELSARE	B	Present
3 X	AISHWARYA P	B	ABSENT
<del>4</del>	CHIDRI BALAJI	B	Balaji
5 X	PRAJWALA	B	ABSENT
<del>6</del>	POORNIMA L	B	Present
<del>7</del>	SAMEEKSHA M P	B	Present (KPMG)
8 X	RAKSHITH R T	B	KPMG
9 X	SHUBHA R	B	KPMG
10 X	ADITI RANI	B	ABSENT
11 X	NEELAMMA M K	B	ABSENT
<del>12</del>	NAMRATHA N	B	Namrath
<del>13</del>	OLETI SAI SREENITHIYA	B	Nithya
<del>14</del>	RAMANUJAM H J	B	Ram
<del>15</del>	CHAVI JAGADEESH	B	Present
16 X	MALLESH S	B	ABSENT
17 X	SRINIDHI K	B	KPMG
<del>18</del>	B SHASHANK	B	Bhashank
<del>19</del>	NAGARAJ GAJANAN HEGDE	B	Hegde
20 X	YASHASWINI P	B	ABSENT
21 X	TANUSHREE R	B	Present
22 X	CHETHAN KUMAR V A	B	ABSENT
23 X	DEEPAK GOPALAKRISHNAN	B	ABSENT
24 X	POORNAPRAJNYA K MANGALVEDI	B	<del>Poo</del> ABSENT
<del>25</del>	JENISHA MENEZES	B	Present
<del>26</del>	SRAVANI SUNIL MHALSEKAR	B	Present
27 X	M RITISH	B	KPMG
28 X	PREETHAM D VARMA	B	ABSENT
<del>29</del>	DHIRAJKUMAR BELAVADI	B	Present

30	FERNANDES RICHA FLORINDA	B	Present
31	MEGHA U JOSHI	B	Megha
32	HEGDE PAVANA GANAPATHI	B	Present
33	LOYSTON CRASTA	B	<del>Present</del>
34	ANJANA KSHIRASAGAR	B	Present
35	TEJAS H P	B	<del>Present</del> ABSENT
36	AMITH BHAT	B	Present
37	NUTHANA U	B	Present
38	MUCHELI SUBBARAJU	B	Present
39	NANDAGOPAL B R	B	<del>Present</del> ABSENT
40	VISHAL SHIVARAJ	B	Present
41	SHASHI KUMAR R	B	ABSENT
42	YASHWANTH R	B	ABSENT
43	NAVEEN C	B	KPMG
44	PAVAN KUMAR M	B	KPMG
45	MADHUSUDAN G	B	ABSENT
46	ANNASAGARAM RAGHAVENDRA	B	ABSENT
47	SYED MUSSAVEERULLA	B	<del>Mussav</del> ABSENT
48	SYED SAMEER	B	<del>S</del> ABSENT
49	GURU VARUN G	B	ABSENT
50	NAVEEN SETTY N A	B	KPMG
51	REHAN FAISAL QADRI	B	ABSENT
52	SMITHA M	B	ABSENT
53	ANIRUDH K	B	ABSENT
54	SALMAN FAISAL QADRI	B	<del>Salman</del> ABSENT
55	RAVISH RAMACHANDRA HEGDE	B	Present
56	POOJA VALLUR	B	Present
57	MAHANTH GOWDA K C	B	KPMG
58	SHAH VINIT SIDDHARTH	B	V. S. Shah
59	NAYANA G C	B	<del>Present</del> ABSENT
60	NIRANJAN JANARDHAN HEGDE	B	Present
1	VIPUL VILAS NAIK	C	Vipul
2	M PRANEETH KUMAR REDDY	C	KPMG
3	NIKHIL S ANJANALLI	C	Nikhil
4	KARTHIK P SHETTY	C	Present
5	AMITH C	C	Amith
6	AKANKSH P	C	<del>AKANKSH</del> ABSENT
7	SACHITH B K	C	ABSENT
8	SOURAV SADANAND SWAR	C	<del>Sourav</del> ABSENT
9	NISHANTH KRISHNA	C	NK
10	MEHUL V BHASKAR	C	Present
11	SHUBHAM RAJENDRA REVANKAR	C	Present
12	SHEEBAL M S	C	Present
13	VISHNU KUMAR	C	Present
14	AKHILA H	C	Akhila
15	ANANYA P HEGDE	C	Present

16	NIVEDITHA K SWAMY	C	Niveditha
17	S SHREYAS	C	Present
18	B S SUSHEN	C	Present
19	PRAJWALA H	C	Prajwala
20 X	VAISHNAVI N	C	Vaishnavi
21	M S SUKRUT	C	Meer
22	AMOGHA Y G	C	Amogha
23	BHARATH K S	C	Bharath K.S.
24 X	SHUBIKSHA S	C	KPMG
25	P T KIRTI	C	Pratiksh
26	MANOJ RAKSHATH B S	C	Manoj
27	DIVYA SHREE M	C	Divyashree
28	VARUN S BHARADWAJ	C	
29 X	S KARTHIK	C	ABSENT
30 X	PRAMOD K L	C	ABSENT
31	BHOOMIKA BHAT	C	
32	SOUMYA GANAPATI HEGDE	C	Soumya
33	SHREEKRISHNA	C	
34	YOGASHREE C N	C	
35	CHARANA T U	C	
36	NIKITHA J SHANBHOG	C	Nikitha J
37	DIHANYA S SHARMA	C	Diya's Sharma
38	GANESH HEGDE	C	Ganesh
39	ANUSHA PRAKASH	C	Anusha
40	JAGADISH SHENOY R	C	Present
41	MADHAN KUMAR C S	C	Present
42	DHANUSH K V	C	Present
43	SWAMI SAMIKSHA PUSHPARAJ	C	Present
44 X	NALASANI VARSHITHA	C	Nalasa
45	KOTHA KEERTHANA	C	Keerthana
46	SANKALP V	C	Present
47	MANOJ N S	C	Manoj
48	SHIVAM GANAPATI ANVEKAR	C	Anvekar
49 X	SHUBHAM SINGH	C	Shubham, ABSENT
50 X	ABHIJEETH MASHETTY	C	KPMG
51 X	PRANITH KUMAR S	C	Pranith Kumar
52	LIKITHA A	C	Likitha A
53	BHUPALI SAURABH PRAKASH	C	Bhupali
54 X	SYED RAIHAN	C	
55	SHRI HARI L	C	Shrihari
56	SATHYA B NAYAKA	C	Sathya nayaka
57	NEHA H V	C	Neha
58	SAAHIL SRIKANT KULLOLI	C	Saahil
59	SIMRANJIT KAUR	C	KPMG
60 X	AGAMYA A KINHAL	C	Agamya A