

3 day Workshop - Startups & Role of CA's as Investment catalyst

Day	Session No	Time Slot	Topic	Sub Topic
Day 1: Startup Ecosystem and Core Legalities	-	09:30 - 10:00	<i>Registration and Tea/Coffee</i>	-
	-	10:00 - 11:00	Introductory session	Overview of 3 days workshop
	Session 1	11:00 - 12:00	Understanding the Startup Ecosystem & Investment Management	<ol style="list-style-type: none"> 1. The startup landscape in the current economic scenario. 2. Key players and their roles: Entrepreneurs, investors, accelerators, and government. 3. The importance of investment management in growing and scaling startups. 4. Global vs. local startup ecosystems: Trends, challenges, and opportunities.
	Session 2	12:00 - 01:00	Startup Formation and Legal Considerations	<ol style="list-style-type: none"> 1. Co-founder agreements: Equity split, vesting schedules, and conflict resolution. 2. ESOP planning: Best practices for startup team retention and motivation. 3. Selecting the right legal entity: LLP vs. Pvt. Ltd. vs. other structures. 4. DPIIT startup recognition, benefits, and government support programs. 5. Intellectual Property Rights (IPR): Securing patents, trademarks, and copyrights for long-term value.
	-	01:00 - 02:00	<i>Lunch Break</i>	-
	Session 3	02:00 - 03:00	Evaluating and Crafting the Perfect Pitch Deck	<ol style="list-style-type: none"> 1. Key components of a successful pitch deck: Storytelling and business metrics. 2. Financial modeling and projections: How to present growth potential. 3. Assessing technical viability and scalability of your product/service. 4. Competitive landscape analysis: Positioning your startup against competitors.

	Session 4	03:00 - 04:00	Interactive Pitch Deck Workshop	<ol style="list-style-type: none"> 1. Live review of pitch decks with feedback from experts. 2. Workshop activity: Participants present their own decks for constructive critique. 3. Best practices for presenting to different types of investors (VCs, angel investors, etc.).
	-	04:00 - 04:30	<i>Tea/Coffee Break</i>	
	Session 5	04:30 - 05:30	Interactive Pitch Deck Workshop Part 2	Presentation by 2 successful startups
Day 2: Investment Strategies and Financial Structuring	-	09:30 - 10:30	<i>Tea/Coffee</i>	
	Session 6	10:30 - 11:30	Introduction to Investment Thesis	<ol style="list-style-type: none"> 1. What is an investment thesis? Understanding the core components. 2. Types of investment models: Equity, debt, convertible notes, and SAFEs. 3. Identifying potential markets and industries for investment. 4. How to develop a compelling investment thesis as an investor or a startup.
	Session 7	11:30 - 01:00	Structuring Investment Rounds	<ol style="list-style-type: none"> 1. Seed, Series A, B, C: Understanding different stages of startup funding. 2. Valuation methodologies: Pre-money and post-money valuation models. 3. Dilution and equity management: Maintaining control while raising capital. 4. Convertible notes vs. equity financing: Pros and cons.
	-	01:00 - 02:00	<i>Lunch Break</i>	
	Session 8	02:00 - 03:00	Advanced AIF (Alternate Investment Fund) Models	<ol style="list-style-type: none"> 1. Overview of AIFs: CAT I, CAT II, and CAT III funds. 2. Setting up and managing an AIF: Regulatory compliance and governance. 3. Raising capital through angel networks, venture debt funds, and hybrid models. 4. Legal and tax implications of AIFs for both investors and startups.

	Session 9	03:00 - 04:00	Chartered Accountants as Strategic Advisors & Wealth Managers	<ol style="list-style-type: none"> 1. Due diligence: Ensuring startups are investment-ready. 2. Advising on legalities, term sheets, and valuation matrices. 3. Managing startup investments as part of a diversified portfolio. 4. Family office management and creating investment networks for wealth clients.
	-	04:00 - 04:30	<i>Tea/Coffee Break</i>	
	Session 10	04:30 - 05:30	Fundraising Strategies for Early-Stage Startups	<ol style="list-style-type: none"> 1. Timing and Duration of Fundraising 2. Investor Pitching and Presentation Skills 3. Leveraging Accelerators and Incubators 4. Utilizing Co-Working and Innovation Hubs
Day 3: Exit Strategies, and Closing Discussions	-	09:30 - 10:30	<i>Tea/Coffee</i>	
	Session 11	10:30 - 12:00	Registering and Managing AIFs & Funds	<ol style="list-style-type: none"> 1. Step-by-step process of registering an AIF. 2. Fund setup and compliance management under SEBI regulations. 3. How to establish funds, facilitators, and accelerators within GIFT City. 4. Tax implications and legal frameworks for fund registration.
	Session 12	12:00 - 01:00	Exit Strategies for Startups and Founders	<ol style="list-style-type: none"> 1. Preparing for an exit: What founders should know about selling their startup. 2. Mergers, acquisitions, and strategic partnerships as exit routes. 3. Risk mitigation strategies for founders during exits. 4. Role of investors in shaping and facilitating startup exits.
	-	01:00 - 02:00	<i>Lunch Break</i>	
	Session 13	02:00 onwards	Valedictory Session & certificate distribution & followed Tea/Coffee Break	