



Family Wealth Structuring and Islamic Inheritance Course: Holding Companies, Waqf and Trusts

18 – 22 April 2027

Jeddah - Corniche four-star



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Ref: 1677_26336 **Date:** 18 – 22 April 2027 **Location:** Jeddah - Corniche four-star **Fees:** 19500 SAR

Introduction:

Family wealth structuring and Islamic inheritance, covering holding companies, waqf and trusts, is a 5-day course for family principals, family office staff and private bankers, ending with a Family Wealth Transfer Structuring Plan for a case family. Estates held directly by a founder often splinter on death into small undivided stakes, frozen bank accounts and disputed shares among heirs, eroding businesses that took decades to build. Nominees already handle family assets or advise wealthy clients and learn through case studies built on family trees, asset registers and draft deeds. CoreConcept Training Center delivers this family wealth structuring course.

Course Objectives:

- Calculate faraid shares for a given family tree, applying fixed shares, residuary heirs, exclusion, awl and radd
- Assess how far a wasiyya, lifetime gifts and voluntary heir agreements can adjust an estate within the one-third limit
- Design a family holding company with share classes, transfer restrictions and a dividend policy that keeps assets undivided
- Compare family waqf, private foundations and trusts for asset protection, control, beneficiary rights and Shariah acceptability
- Draft key shareholder agreement terms, including pre-emption, drag-along, tag-along and buy-back clauses, that prevent fragmentation
- Coordinate legal, Shariah and tax advisers through a structuring plan that sequences each transfer step

Target Audience:

- Staff responsible for administering family assets, registers and documentation in single-family and multi-family offices
 - Staff responsible for advising wealthy families on estate, ownership and transfer arrangements in private banks
 - Family members responsible for holding family shares, property and investments on behalf of siblings and cousins
 - Staff responsible for company secretarial and shareholder record work in family-owned groups
 - Staff responsible for trust, foundation and fiduciary administration serving business families
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Course Outline:

Day 1: Family Estates, Fragmentation and Faraid Foundations

- Family Asset Register Mapping Direct and Indirect Holdings
- Estate Fragmentation Patterns in Undivided Family Property
- Quranic Fixed Shares Table for Spouses, Parents and Children
- Residuary Heirs Ranking and Exclusion Rules Explained
- Family Tree Diagram as an Inheritance Planning Baseline

Day 2: Inheritance Calculation, Wasiyya and Structuring Vehicles

- Faraid Share Calculation Worksheet With Awl and Radd
- Wasiyya One-Third Limit and Bequests to Non-Heirs
- Hiba Lifetime Gifts and Takharuj Heir Settlement Agreements
- Private Foundation Charter, Council and Beneficiary Classes
- Trust Deed Roles of Settlor, Trustee and Protector

Day 3: Holding Companies, Family Waqf and Shareholder Agreements

- Family Holding Company Tiering Above Operating Subsidiaries
- Voting, Non-Voting and Preference Share Class Design
- Dhurri Waqf Deed Clauses for Generational Beneficiaries
- Pre-Emption, Drag-Along and Tag-Along Shareholder Agreement Clauses
- Buy-Back Formula and Exit Valuation Mechanism for Heirs

Day 4: Cross-Border Assets, Disputes and Adviser Coordination

- Offshore Trust and Foundation Recognition by Shariah Courts
- Multi-Jurisdiction Asset Situs and Conflict of Laws Checklist
- Tax Transparency Reporting Duties for Family Holding Structures
- Heir Dispute Scenarios and Deadlock Resolution Clauses
- Legal, Shariah and Tax Adviser Responsibility Matrix

Day 5: Case Study Building the Wealth Transfer Structuring Plan

- Case Family Estate Distribution Under Current Direct Ownership
 - Case Comparison of Waqf, Foundation and Holding Options
 - Case Shareholder Agreement Term Sheet for Second Generation
 - Transfer Step Sequencing and Adviser Sign-Off Timeline
 - Family Wealth Transfer Structuring Plan Completion and Defence
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Skills You Will Gain:

- Faraid Share Computation
- Estate Fragmentation Analysis
- Holding Structure Design
- Share Class Engineering
- Waqf Deed Drafting Awareness
- Trust and Foundation Selection
- Shareholder Agreement Negotiation
- Multi-Adviser Coordination

Why Attend This Course:

- Deliver a Family Wealth Transfer Structuring Plan to the family principal and family council for decision on vehicles, share classes and transfer sequence
- Decide whether a family waqf, a private foundation, a trust or a holding company best fits a given asset and family situation
- Avoid frozen estates, forced sales of family property and heir disputes caused by assets left in a founder's personal name
- Brief colleagues and relationship teams on faraid calculation, wasiyya limits and shareholder agreement terms using the course worksheets

Conclusion:

Back at work, the participant hands the family principal and family council a Family Wealth Transfer Structuring Plan setting out which assets move into a holding company, waqf, foundation or trust, how faraid shares translate into share classes and which shareholder agreement terms protect the whole. Legal, Shariah and tax advisers use its responsibility matrix to sequence their work. After the first transfer step is executed, the family office should review whether heir consents, deeds and registers match the plan and update it before the next step.

Frequently Asked Questions FAQ:

What should participants know before the family wealth structuring and Islamic inheritance course?

Participants should be familiar with the assets of a family or client book and basic company share structures. No formal study of fiqh is needed. Bringing an anonymised family tree and asset list helps with the faraid calculations and case work.

How does family wealth structuring and Islamic inheritance training differ from a family office set-up course?

It focuses on the legal and Shariah vehicles that carry assets between generations, faraid calculation, waqf, foundations, trusts and shareholder agreements. A family office course addresses the office's operating model, investment policy and staffing rather than how ownership itself is structured and transferred.

Can family wealth structuring with a holding company change the Islamic inheritance shares of heirs?

No. A holding company does not alter faraid shares; heirs still inherit their fixed portions, now held as shares. What the structure changes is control, transferability and continuity, through share classes, transfer restrictions and buy-back terms agreed among the heirs.

What do participants take back from the family wealth structuring and Islamic inheritance course?

Participants take back a Family Wealth Transfer Structuring Plan for a case family, a faraid share calculation worksheet, a vehicle comparison of waqf, foundation, trust and holding options, a shareholder agreement term sheet and an adviser responsibility matrix.
