



AMICORP TRUSTEES ESTATE AND SUCCESSION PLANNING SERVICES

Estate and succession planning is to understand and determine how to utilize, preserve and pass your assets for the benefit of your spouse and children as per your wishes and not as per personal law. Our dedicated teams specialize in onshore estate and succession planning services. We have local expertise to provide personalized structured solutions for multiple families i.e., joint and nuclear families, family businesses, and individuals in India.

Amicorp Trustees (India) Private Limited (ATIPL), is an integral part of Amicorp Group. We concentrate exclusively estate and succession planning services offering tailor-made solutions for effective succession planning, fund structuring, company management services, family enterprise consulting, escrow and custodial services.

THE ADVANTAGES OF PLANNING YOUR ESTATE

- ➔ Distribution of assets as per one's wish and not as per personal law
- ➔ Asset protection from within or outside the family
- ➔ Avoid disputes/conflicts within the family
- ➔ Continuous support to the dependent beneficiaries e.g. minors, parents, medical emergencies, etc.
- ➔ Demarcation between personal and business income
- ➔ Optimization of global taxation where the children are settled abroad
- ➔ Wealth preservation and consolidation

ESTATE PLANNING CAN BE IMPORTANT FOR

- ➔ A business, private home, entrepreneur or professional
- ➔ Nuclear or joint family
- ➔ A family with no legal heir
- ➔ An NRI with assets in India
- ➔ A family with beneficiaries overseas
- ➔ Parent of a special child

Our services include:

- ➔ **Will**
 - We offer drafting, registration and safe custody of wills
- ➔ **Trust formation**
 - Drafting of trust deeds
 - Registration of trust deeds
 - Management of trust as trustee or managing trustee
- ➔ **Custodial services**
 - Safe custody of will and trust deed
 - Safe custody of property documents mentioned in a will or held under a trust
- ➔ **Executorship services**
 - Obtaining letter of administration and probate from the court
 - Identifying assets of the testator
 - Distributing the assets to the beneficiaries
- ➔ **Trustees or managing trustees**
 - Smooth transmission of assets with minimum administrative hassle
 - Managing trust assets with professional guidance and efficient management
 - Family welfare and distribution of trust assets as expressed in the trust deed
 - To provide with an integrated trust structure that establishes a long-term succession plan
 - Meeting the compliance and regulatory requirement

Amicorp Trustees (India) Private Limited offers tailor-made solutions for effective succession planning, including estate management, preservation, and legacy. We welcome you to contact us for more information, questions or proposal requests.

www.amicorp.com/offices/mumbai-trustees

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AMICORP GROUP
YOUR BUSINESS IS OUR BUSINESS

Amicorp is a boutique service provider with a dedicated network of international experts and specialists. We offer a wide range of customized solutions to help businesses grow and be successful. Our innovative solutions include cross-border structuring, corporate assurance and regulatory compliance support, and multi-facet business support alternatives for companies wanting to invest or expand locally or globally. In addition, we offer fund administration, financial services and global family office solutions, all addressing the distinct needs of our clients. We collaborate with and support clients in over 100 countries worldwide; we offer them solutions that they are looking for in today's ever-changing macro environment.

*International networking
and global experience by a team of 700+ knowledgeable experts*



FOR MORE INFORMATION

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