

*Known as one of the leading service providers globally, Amicorp Group offers multi-level and business critical solutions to global corporates, international advisory groups, financial institutions, investment firms and family offices. We provide personalized service, and we tailor our offerings to the needs of our clients.*

Amicorp Trustees (India) Pvt. Ltd. (ATIPL) with presence in Mumbai, Delhi & Bangalore, is an integral part of Amicorp Group. ATIPL concentrates exclusively on estate & succession planning services for Indian residents, NRIs and PIO/OCI card holders. Through estate planning you can safeguard the interests of your loved ones and yourself by ring-fencing your assets, enjoying the benefits during your lifetime and distributing the same as per your wishes after your demise. Estate planning is for everyone regardless of age, marital status or net worth.

## 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 house, entrepreneur or professional
- ➔ Nuclear or joint family
- ➔ A family with no legal heir
- ➔ An NRI with assets in India
- ➔ A family with beneficiaries overseas; and Parent of a special child

Amicorp Trustees (India) Pvt. Ltd. offers tailor-made solutions for effective estate and succession planning, including estate management, preservation and legacy.

## 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

### ALTERNATIVE INVESTMENTS FUNDS

- ➔ Fund structuring
- ➔ Trust formation and fund set up
- ➔ Ongoing administration and tax filing
- ➔ Regulatory and compliance reporting; FATCA and CRS compliance

### 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 requirements

## FAMILY GOVERNANCE

- ➔ Understanding family vision, mission and values
- ➔ Articulating family charter
- ➔ Building business governance models
- ➔ Family education and development
- ➔ Drafting family arrangement deed

## OTHER SERVICES

- ➔ Escrow for domestic and offshore M&A

## 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

### Tariq Aboobaker

Managing Director – Amicorp Mumbai Trustees  
Tel: +91 22 2431 1621  
t.aboobaker@amicorp.com



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