



INDIALAW

HNIS

Leading HNI Law Firm in India for Wealth Structuring and Estate Planning

PRACTICE PROFILE • MAY 2026

Overview

India's growing economy has led to an increase in the number of high net worth individuals (HNIs) seeking sophisticated legal solutions to manage and protect their wealth. The legal framework governing wealth management and succession planning includes various laws and regulations, such as the Indian Trusts Act, Income Tax Act, Foreign Exchange Management Act (FEMA), and others. Our team is well-versed in these regulations and provides strategic legal advice to ensure compliance and facilitate successful wealth management.

We provide comprehensive legal services to high net worth individuals and families. Our expertise encompasses wealth management, estate planning, succession, philanthropy, and cross-border legal matters. We assist clients in navigating the complex legal landscape, ensuring compliance, protecting assets, and facilitating successful wealth transfer and preservation.

Our Services

- **Estate and Succession Planning:**
 - Drafting wills and testamentary documents to ensure clear and legally binding distribution of assets.
 - Establishing private family trusts to protect assets and facilitate smooth intergenerational wealth transfer.
 - Advising on guardianship arrangements for minors and individuals with special needs.
- **Wealth Structuring and Management:**
 - Structuring family offices to manage investments and assets efficiently.
 - Advising on asset protection strategies to safeguard wealth from potential liabilities.
 - Assisting with the legal aspects of managing luxury assets, art collections, and other high-value properties.
- **Tax Planning and Compliance:**
 - Providing tax-efficient structures for wealth management and succession planning.
 - Advising on compliance with domestic and international tax regulations.
 - Assisting with tax filings and liaising with tax authorities as needed.
- **Philanthropy and Charitable Giving:**
 - Structuring charitable trusts and foundations to align with clients' philanthropic goals.
 - Advising on compliance with regulations governing charitable organizations.
 - Assisting with the legal aspects of corporate social responsibility (CSR) initiatives.
- **Cross-Border Legal Matters:**
 - Advising on the legal implications of holding assets in multiple jurisdictions.
 - Assisting with the establishment of offshore trusts and entities.
 - Navigating the complexities of international estate planning and succession laws.
- **Dispute Resolution:**
 - Representing clients in disputes related to inheritance, trusts, and family settlements.
 - Advising on conflict resolution strategies to preserve family harmony.
 - Assisting with litigation, arbitration, and mediation proceedings.

Key Highlights

Our firm combines deep industry knowledge with legal expertise to deliver practical solutions tailored to the unique needs of high net worth individuals. We understand the complexities of wealth management and offer proactive legal support to help clients achieve their personal and financial goals while mitigating risks.

Frequently Asked Questions

Q1 **What legal services do HNI advisory practices typically cover in India?**

HNI legal advisory covers estate and succession planning, wealth structuring through family trusts and family offices, tax-efficient asset holding, philanthropy structuring, cross-border compliance under FEMA, and dispute resolution related to family wealth and inheritance matters.

Q2 **When should a high net worth individual start engaging a wealth planning lawyer?**

Ideally, before a major liquidity event such as a business sale, IPO, or large inheritance. Early engagement allows proper structuring under the Income Tax Act and FEMA, reducing future disputes and tax inefficiencies that become harder to unwind once assets are already distributed.

Q3 **Which Indian laws and regulators govern HNI wealth structuring and succession?**

Key statutes include the Indian Trusts Act 1882, Indian Succession Act 1925, Hindu Succession Act 1956, Income Tax Act 1961, and FEMA 1999. RBI regulates cross-border remittances under LRS, while SEBI rules apply to investment vehicles. Personal law varies by religion.

Q4 **How long does it take to set up a private family trust in India?**

A well-drafted private family trust can be established in four to eight weeks, depending on the complexity of the asset pool and number of beneficiaries. Key cost drivers include stamp duty, which varies by state, the nature of assets being settled, and whether cross-border elements exist.

Q5 **What documents are needed to begin estate and succession planning?**

Clients should compile a full asset inventory covering immovable property, financial holdings, business interests, and overseas assets. Existing wills, trust deeds, partnership agreements, company shareholding records, insurance policies, and any prior family settlement deeds are also needed for review.

Q6 **What common mistakes do HNIs make in succession and wealth planning?**

A frequent pitfall is relying solely on a will without addressing jointly held assets, nominations, or business succession. Nominations under insurance or demat accounts do not override a will in all cases, creating conflicts. Ignoring FEMA compliance for overseas assets is another costly oversight.