Trusts & Estate Planning

Leading Trusts and Estate Planning Law Firm in India for Succession Matters

PRACTICE PROFILE • MAY 2026

Overview

We specialize in providing comprehensive legal services in the realm of trusts and estate planning. Our expertise encompasses the creation, administration, and litigation of both private and public trusts, ensuring that our clients' assets are managed and distributed according to their wishes. We assist individuals, families, and institutions in navigating the complexities of trust law, offering tailored solutions that align with their unique needs and objectives.

Our Services

- **Trust Formation & Structuring:** Assisting in establishing private and public trusts, including family, charitable, and religious trusts, and advising on optimal structures such as revocable, irrevocable, discretionary, and fixed trusts.
- **Succession Planning:** Developing comprehensive estate plans that integrate trusts, wills, and other instruments to facilitate smooth asset transfer, minimize tax liabilities, and address cross-border considerations.
- **Trust Administration & Compliance:** Assisting trustees in the administration of trust assets, ensuring adherence to fiduciary duties and legal obligations, and providing support in the preparation of financial statements, tax filings, and regulatory compliance.
- **Tax Planning & Optimization:** Advising on tax-efficient strategies for trust income, including utilization of exemptions and deductions available under Indian tax laws, and ensuring compliance with tax regulations, including filing trust income tax returns and managing tax liabilities.
- **Dispute Resolution & Litigation:** Representing clients in disputes related to trust administration, including challenges to the validity of trust deeds and actions of trustees, handling litigation, arbitration, and mediation proceedings, and advising on conflict resolution strategies to preserve business relationships.
- **Charitable Trusts & CSR Advisory:** Assisting in setting up charitable trusts, ensuring compliance with regulations under the Income Tax Act for obtaining tax exemptions, advising on managing donations and contributions, and providing guidance on maintaining transparency in operations.
- **Cross-Border Estate Planning:** Advising on the legal implications of holding assets in multiple jurisdictions, assisting with the establishment of offshore entities and operations, and navigating the complexities of international estate laws and regulations.
- **Family Governance & Succession Structures:** Helping establish governance frameworks for family-owned businesses to ensure smooth leadership transitions, continuity planning, and conflict resolution, and advising on pre-IPO and start-up structuring to streamline family interests in business
- **Philanthropy & Legacy Planning:** Assisting in structuring charitable pursuits in a tax-efficient and regulatory-compliant manner, aligning corporate social responsibility (CSR) with personal philanthropic goals, and advising on legacy planning to preserve family values and reputation
- **Asset Protection & Risk Management:** Advising on strategies to protect trust assets from potential risks, including legal claims or financial instability, and providing support in resolving disputes related to trust administration or between trustees and beneficiaries.
- **Review & Amendment Services:** Conducting regular reviews of the trust's performance and structure to ensure it continues to meet its objectives and legal requirements, and assisting in amending the trust deed or structure as necessary to reflect changes in law, personal circumstances, or financial goals.
- **Trustee Training & Advisory:** Providing training to trustees on their roles and responsibilities, including legal obligations and best practices for trust management, and offering ongoing advisory services to address any questions or concerns related to trust management and planning

Key Highlights

Our firm combines deep industry knowledge with legal expertise to deliver practical solutions tailored to the trust and estate planning sector. We understand the unique challenges and opportunities within this area and offer proactive legal support to help clients achieve their objectives while mitigating risks.

Frequently Asked Questions

Q1 What does trusts and estate planning involve under Indian law?

It covers the creation and structuring of private and public trusts, drafting wills, succession planning, and tax-efficient asset transfer strategies. The goal is to ensure wealth is preserved, managed, and distributed in line with the settlor's intentions across generations.

Q2 When should an individual or family start thinking about estate planning?

Ideally, as soon as significant assets are acquired or a family business is established. Delays risk intestate succession under personal laws, unintended tax exposure, and family disputes. Cross-border holdings or multiple legal heirs add urgency to structured planning.

Q3 Which Indian statutes govern the formation and regulation of trusts?

Private trusts are governed by the Indian Trusts Act, 1882. Public and charitable trusts fall under state-specific legislation such as the Bombay Public Trusts Act, 1950. Tax treatment is addressed under the IT Act, 1961, particularly Sections 11, 12, and 13.

Q4 How long does it typically take to set up a trust in India?

Drafting and executing a trust deed generally takes two to four weeks, depending on complexity. Registration with the Sub-Registrar and, for charitable trusts, obtaining 12A and 80G registrations from the IT Department can add another four to eight weeks.

Q5 What documents are needed to begin setting up a trust or estate plan?

Key documents include identity and address proof of the settlor and trustees, a detailed inventory of assets, existing wills or succession instruments, property title documents, and any prior trust deeds. For charitable trusts, the objects clause and governance framework are also required.

Q6 What common mistakes do families make in trust and succession planning?

Frequent errors include failing to align the trust structure with applicable personal law, neglecting to register the trust deed, not updating beneficiary designations after life events, and overlooking annual IT Act compliance such as filing Form 10B for charitable trusts.