

Family Office Advisory Services



Shape the future
with confidence

Family offices are adopting forward-looking strategies for wealth management, investments and succession planning

The number of family offices in India has grown six times in just six years

2018 2024
45 → 300

The increase shows the will and intent to streamline, formalize and create structures for wealth and ownership

Investment in private equity has grown significantly

1 in 5

Indian family offices are increasingly adopting higher-risk, higher-return investment strategies, with significant allocations to growth-oriented, non-traditional asset classes

Family offices are concerned about new and changing tax laws and regulations

48%

Family offices use professional guidance for compliance as they diversify across asset class, geographies and multiple entity formats

Source: The Indian family offices Playbook 2025, EY Private Credit Report

EY provides comprehensive support tailored to your current and future family office, enabling confident investment, growth and progression to the next phase.

Tax, Regulatory and Exchange Control

- Establish and structure multi-generational family office structures, including overseas holdings and GIFT City structures
- Provide assistance with personal and corporate tax compliance, transaction tax planning and resolving tax disputes
- Maintain focus on adherence to Exchange Control compliance for cross-border investments
- Support succession planning, inheritance management and governance frameworks

Strategy and Transactions

- Provide investment banking advisory on acquisitions, divestments and other strategic transactions
- Conduct financial, commercial, tax, and operational due diligence for prospective investments
- Provide valuation services
- Develop financial and business models for investment analysis, budgeting, forecasting and scenario planning
- Structure investments and transactions
- Formulate investment strategies aligned with the family's wealth preservation and growth objectives

Forensic and Integrity Services

- Conducting thorough pre-investment integrity assessments
- Ongoing governance and oversight, including litigation and dispute assistance, incident-specific inquiries
- Post-investment portfolio surveillance

Accounting and Financial Compliance

- Financial and accounting advisory to prepare future-ready financial statements
- Real-time monitoring of investment portfolios using advanced KPI-driven dashboards
- Secretarial compliance and regulatory consulting
- Adherence to Indian corporate law requirements

CFO-as-a-Service

- Complete oversight of tax, accounting, company secretarial and compliance responsibilities

Risk and Governance

- Customize governance frameworks for family offices to enhance transparency and accountability

To know more, connect with our
EY Family Office Advisory team

Surabhi Marwah
Partner, EY India
surabhi.marwah@in.ey.com
+91-9811145569

Puneet Sachdev
Partner, EY India
puneet.sachdev@in.ey.com
+91-9873288189

Ajay S Agashe
Mumbai
Tax Partner, EY India
ajay.agashe@in.ey.com
+91 9833394152

Bharath P
Hyderabad
Tax Partner, EY India
bharath1.p@in.ey.com
+91 9884455106

Prashant Maheshwari
Ahmedabad
Tax Partner, EY India
Prashant.Maheshwari2@in.ey.com
+91 9328041654

Sohil Gala
Pune
Tax Partner, EY India
sohil.gala@in.ey.com
+91 9820556488

KT Chandy
Partner, EY India
kt.chandy@in.ey.com
+91-844116286

Swathanth Rajasekaran
Chennai
Tax Partner, EY India
swathanth.r@in.ey.com
+91 9884083027

Nayan Saboo
Hyderabad
Tax Partner, EY India
nayan.saboo@in.ey.com
+91 9573912456

Jaiman Patel
Ahmedabad
Tax Partner, EY India
jaiman.patel@in.ey.com
+91 9833071413

Amit Maru
Kolkata
Tax Partner, EY India
amit.maru@in.ey.com
+91 9820267838



Scan to
view the report

ey.com/en_in

Ernst & Young LLP

EY | Building a better working world

EY is building a better working world by creating new value for clients, people, society and the planet, while building trust in capital markets.

Enabled by data, AI and advanced technology, EY teams help clients shape the future with confidence and develop answers for the most pressing issues of today and tomorrow.

EY teams work across a full spectrum of services in assurance, consulting, tax, strategy and transactions. Fueled by sector insights, a globally connected, multi-disciplinary network and diverse ecosystem partners, EY teams can provide services in more than 150 countries and territories.

All in to shape the future with confidence.

EY refers to the global organization, and may refer to one or more, of the member firms of Ernst & Young Global Limited, each of which is a separate legal entity. Ernst & Young Global Limited, a UK company limited by guarantee, does not provide services to clients.

Information about how EY collects and uses personal data and a description of the rights individuals have under data protection legislation are available via ey.com/privacy. EYG member firms do not practice law where prohibited by local laws. For more information about our organization, please visit ey.com.

Ernst & Young LLP is one of the Indian client serving member firms of EYGM Limited. For more information about our organization, please visit www.ey.com/en_in.

Ernst & Young LLP is a Limited Liability Partnership, registered under the Limited Liability Partnership Act, 2008 in India, having its registered office at Ground Floor, Plot No. 67, Institutional Area, Sector - 44, Gurugram - 122 003, Haryana, India.

© 2026 Ernst & Young LLP. Published in India.
All Rights Reserved.

EYIN2606-023
ED None

This publication contains information in summary form and is therefore intended for general guidance only. It is not intended to be a substitute for detailed research or the exercise of professional judgment. Neither EYGM Limited nor any other member of the global Ernst & Young organization can accept any responsibility for loss occasioned to any person acting or refraining from action as a result of any material in this publication. On any specific matter, reference should be made to the appropriate advisor.

SB