

EY Family Office Advisory Services



Shape the future
with confidence

Family offices are adopting a forward-looking strategy for their investments and wealth

The number of family offices in India has grown six times in just 6 years

2018
45 → **300**
2024

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 shifting to higher risks, higher rewards strategy, thereby investing heavily into 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 holding structures and through the Gujarat International Finance Tec-City (GIFT), etc.
- Provide assistance with personal and corporate tax compliance, transaction tax planning and resolving tax disputes.
- Assist in maintaining adherence to regulatory requirements and Exchange Control rules essential for cross-border investments.
- Succession planning, inheritance management and governance frameworks.

Strategy and Transactions

- Investment banking
- Transaction due diligence
- Valuation services - enable accurate and fair assessment of potential targets
- Business modelling - Support strategic decision-making, budgeting, forecasting
- Transaction structuring, debt restructuring
- Investment strategy formulation

Forensic Integrity

- Conducting thorough pre-investment integrity assessments
- Ongoing governance and oversight including litigation and dispute assistance, incident-specific inquiries, post-investment portfolio surveillance
- 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, including adherence to Companies Act requirements

CFO as a Service

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

Risk and Governance

- Customize governance frameworks to enhance transparency and accountability

To know more, connect
with our EY Family Office
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All in to shape the future with confidence.

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