

PRIVATE FAMILY TRUSTS

STRUCTURING & BENEFITS



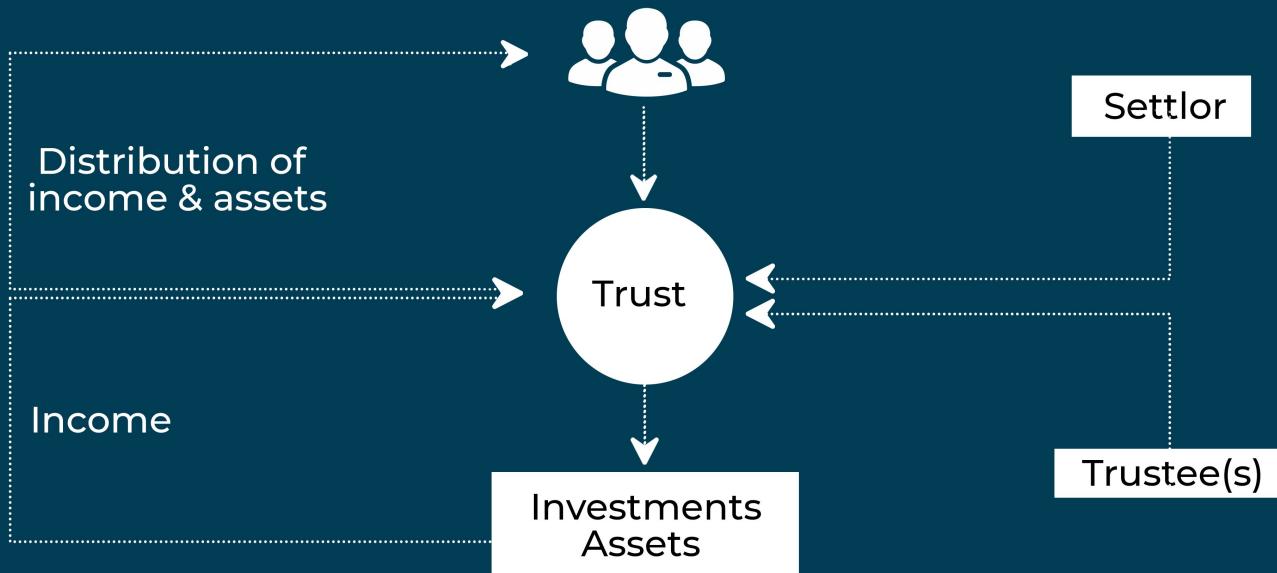
WHY CREATE A FAMILY TRUST

- Succession Planning** : Avoids probate and ensures seamless intergenerational transfer of wealth
- Asset Protection** : Shields personal and business assets from litigation, divorce, or creditor claims.
- Consolidated Wealth Management** : Facilitates unified administration of multiple assets.
- Confidentiality** : Keeps ownership and distribution arrangements out of the public domain.
- Flexibility** : Allows control over when and how assets are distributed, especially useful for minors or financially inexperienced beneficiaries.



TRUST STRUCTURE

- ✓ **Settlor** : The individual who establishes the trust by transferring assets into it.
- ✓ **Trustee** : A person or entity legally responsible for holding and managing the trust assets according to the trust deed.
- ✓ **Beneficiary** : Family member(s) who are entitled to receive income or assets from the trust.
- ✓ **Trust Deed** : The legal document that sets out the trust's purpose, powers, duties of trustees, & rights of beneficiaries.



HOW WE CAN HELP

- ✓ **Structuring:** Advising on appropriate trust type and jurisdiction.
- ✓ **Drafting:** Preparing trust deeds tailored to your family and asset profile.
- ✓ **Regulatory Support:** Filing and compliance under Income-tax, FEMA, and FATCA/CRS.
- ✓ **Family Office Advisory:** Integrated approach to governance, wealth management, and legacy planning.



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