

A close-up photograph of a golf club head and a white golf ball resting on a lush green grass field. The background is a soft-focus view of a golf course under a bright, hazy sky. A red vertical bar is visible on the left side of the page.

# PRIVATE CLIENT SERVICES

BDO IN INDIA  
2023



## OVERVIEW

The advent of technology, rapid pace of globalisation, growing complexities of laws, multiple compliances, and increased exchange of information amongst regulators, has created an ever- dynamic range of opportunities and risks for the High-Net-Worth Individuals (HNI) community, globally.

Whether it's a corporate transaction, family wealth passing on to the next generation, or an investment opportunity, the global tax climate is constantly changing and individuals with global assets are encountering heavier regulations and compliance burdens in relation to their financial affairs.

The multiplicity of disclosures surrounding income, assets and liabilities, succession, wealth, insurance etc. coupled with interplay amongst regulations, a multi- dimensional evaluation is imperative. As a result, good advice that ensures HNIs are operating well within the rules, whilst strategising their investments in a manner that benefits them and their lifestyles is now more valuable than ever before.

With the ever-increasing global information transparency, individuals need to be proactive to ensure adequate compliance with the necessary rules and regulations imposed by various countries.



## OUR SERVICES

As trusted advisers to entrepreneurs and owner managed businesses, the Private Client specialists at BDO India have immense experience in looking after accounts and tax matters of wealthy individuals, their families and their businesses.

Our Private Client Services include:

### Global Accounting and Compliance Support

- Periodic accounting, reconciliations and bookkeeping
- Maintaining General and Investment Ledger

### Tax Services

- Assistance with estimation of tax liabilities and tax management
- Assistance with preparation and filing of annual tax returns
- Advisory on optimising tax rates and reliefs
- Tax management of immovable properties
- Tax reporting for funds, investors and executives

### Charity and Philanthropic Activity Compliance

- Support with philanthropic planning/initiatives
- Advice on tax exemptions and deductions
- Assistance with management and administration of charitable objectives

### Wealth, Assets and Investment Structuring

- Wealth and asset structuring and accounting
- Tax structuring for investment strategy, fund management and private equity

### Residency and Domicile Planning

### Business Structuring and Advisory

- Advisory on:
  - Tax efficient structuring of business ventures and funds
  - Investment structuring
  - Identification of appropriate structures partnerships, corporate vehicles and trusts
- Business and shareholder exit strategies

### Estate and Succession Planning

- Succession planning and wealth preservation (including family entities such as trusts, partnerships and companies)
- Advisory for closely held entities and family office operations
- Advisory on inheritance tax reliefs
- Gift planning

### Litigation, Dispute Resolution, Arbitration and Conciliation Support

- Tax audit support
- Litigation management and support

### Regulatory, Information Exchange, FATCA and CRS Compliance

- Exchange control and regulatory advisory
- Information exchange compliances

### Family Office, Private Trusts and Partnership Management

- Advisory on family-owned businesses
- Structuring of entities to achieve family goals



## WHY BDO IN INDIA



### PERSONALISED APPROACH

We understand, plan, and provide practical solutions tailored to the specific priorities, needs and objectives of a business. With our proactive approaches and collaborative planning methods, we are fully committed to assist you and your business to achieve your defined objectives and offer efficient, constructive, workable and compliant solutions.



### EXPERT TEAM

Our Private Client Services team consists of members with specialist knowledge and experience in international tax, succession planning, wealth and asset structuring, accounting, technology, trust law and family business advisory. We have leading expertise in key specialisms with a proven track record in handling complex issues and working closely with your other agencies like bankers, lawyers, investment advisors etc.



### USE OF TECHNOLOGY AS A TOOL

We value confidentiality and data privacy and uphold the same while using latest technology and relevant tools. We provide updates on emerging trends, consistent positions, standardised practices and coordinated efforts to help us provide a uniform service experience to clients.



### GLOBAL PRESENCE

With exponential growth in demand for cross border expertise in the wake of legislative change, increased compliance and global wealth, the Private Client Services teams across the BDO international organisation are well positioned to deliver market-leading services.



### SEAMLESS COORDINATION

To manage the engagement cohesively and efficiently and minimising the efforts of dealing with multiple advisers, a business can opt to have a single point of contact who would be responsible for liaising with our peers globally and other stakeholders as required.



### COST EFFICIENT SOLUTIONS

With an aim to provide world-class services at reasonable costs, we offer cost efficient solutions and share upfront proposals to agree scope/fees and ensure no surprises.





## ABOUT BDO GLOBAL

BDO is a leading professional services organisation and are global leaders of the mid-tier, with a presence in 160+ countries and over 111,300 people working out of more than 1,800 offices. We endeavor to deliver an exceptional client experience through a tailored solutions approach, while partnering with our employees and clients globally.



Leading consolidation in the mid tier

Over 1,800 offices in more than 160 countries

Over 111,300 highly skilled partners and staff worldwide

BDO posted global revenues of \$12.8 billion in 2022

**TO BE THE LEADER FOR EXCEPTIONAL CLIENT SERVICE**

<p>anticipating <b>client needs</b> and being forthright in our views to ensure the best outcome for them</p>	<p>being clear, open &amp; swift in our <b>communication</b></p>	<p>agreeing to and meeting our <b>commitments</b>: we deliver what we promise, everyday, for every client</p>	<p>providing the right environment for our <b>people</b> and the right people for our clients</p>	<p>creating <b>value</b> through giving clients up to date ideas and valuable insight and advice that they can trust</p>
<p><b>ANTICIPATING CLIENT NEEDS</b></p>	<p><b>CLEAR COMMUNICATION</b></p>	<p><b>MEETING OUR COMMITMENTS</b></p>	<p><b>ENCOURAGING OUR PEOPLE</b></p>	<p><b>DELIVERING VALUE</b></p>

## ABOUT BDO IN INDIA

BDO in India offers Assurance, Tax, Advisory, Business Services & Outsourcing and Digital Services for both domestic and international clients across industries. The team at BDO in India consists of over 4,600 professionals led by more than 270 partners and directors operating out of 14 offices, across 11 key cities.



**270+** PARTNERS  
DIRECTORS

**4,600+** STAFF



**11** KEY CITIES

### OUR SERVICES

#### ASSURANCE

- Accounting Advisory Services
- Financial Statement Audit and Attestation Services

#### TAX

- Corporate Tax Services
- Financial Services Tax
- Global Employer Services
- International Tax Services
- Private Client Services
- Tax Outsourcing
- Transfer Pricing
- Customs & International Trade
- Goods & Services Tax (GST)
- Indirect Tax Assessment & Litigation Assistance
- Tax Technology

#### ADVISORY

- Forensics
- Government Advisory
- IT Risk Advisory & Assurance
- Management Consulting
- Risk Advisory Services
- Sustainability & ESG
- Business Restructuring
- Corporate Finance and Investment Banking
- Deal Value Creation
- Financial Due Diligence
- M&A Tax and Regulatory
- Strategy & Commercial Due Diligence
- Valuations

#### BUSINESS SERVICES & OUTSOURCING

- Global Outsourcing
- Finance and Accounting Outsourcing
- Human Resource Outsourcing
- Payroll Management and Compliance Services
- Secretarial Services and Compliance Management
- Shared Services Centre

#### BDO DIGITAL

- Digital Services
- Technology Products and Solutions

## Contact Us

For any content related queries, you may kindly write in to [taxadvisory@bdo.in](mailto:taxadvisory@bdo.in)

For any other queries or feedback, kindly write to us at [marketing@bdo.in](mailto:marketing@bdo.in)

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### Chennai

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### Delhi NCR - Office 1

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Ahmedabad | Bengaluru | Chandigarh | Chennai | Goa | Hyderabad | Kochi | Kolkata | Mumbai | New Delhi | Pune

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