AZB & PARTNERS
ADVOCATES & SOLICITORS

Private Client Practice

The AZB & Partners' Private Client Practice comprises a dedicated team of lawyers who assist leading promoter families, family businesses and other high–net–worth individuals with various aspects of their private wealth and estate planning, including in relation to cross – border assets and issues. We also assist institutions such as family offices, fiduciaries and accountants.

Being a full–service law firm, with significant expertise and domain knowledge, our work is bolstered by specialists across other practice areas, such as our Forensic, Corporate, Tax, Dispute Resolution and Regulatory teams.

Our work includes:

- Structuring of inter–generational wealth transfers through wills, trusts and gifts
- Planning for the succession, preservation and acquisition / disposition of luxury assets and collectibles
- Planning high–value philanthropic bequests
- Family governance issues
- Family disputes / settlements

International and Domestic Private banks on (i) succession planning for their clients; (ii) fiduciary risk management for assets held by them for clients and their heirs; and (iii) the creation of trust structures.

High–Net–Worth Individuals with a cross–border presence, on regulatory and tax issues arising from a change in their residential status, marital status and domicile.

Multi–generational Family Businesses, on structuring and documenting their business succession plans, strategizing inter–generational transfers of control, IP protection and family constitutions.

Individuals with vulnerable dependants, such as special needs children, on protecting the interests of their near relatives.

Promoters of listed companies on structuring their holdings into family trusts, after seeking regulatory approval.

Second generation business family in the vernacular media space, with a family constitution and incorporation of family governance mechanisms into a shareholders agreement

Several Ultra–High–Net–Worth Individuals on structuring their legacies and analysing uncodified laws related to Hindu Undivided Families.

Founder of a large telecom and financial services company on succession planning, including restructuring of existing trusts and family arrangements.

Prominent family engaged in the real estate business, on planning and documenting the separation of assets owned by various companies.

Reputed Private Museum on (i) its acquisition of high value works of art, qualifying as antiquities under the Antiquities and Art Treasures Act; and (ii) receiving valuable paintings as gifts from a donor.

Private Bank on its acquisition of an online platform enabling users to draft wills, including advice on the enforceability of wills and laws of succession.

Founder and Chairman of a conglomerate with succession planning, including with respect to shares in valuable listed companies held by his family.

High–Net–Worth Individuals in relation to disputes pertaining to their inheritance, succession and family matters.

Family involved in the information technology space on the execution of a family member's estate.

Technology Entrepreneur in relation to structuring personal investments and philanthropy planning.

CXO of a multinational company on structuring worldwide asset holdings for succession planning.

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