



Addressing the Complex Needs of UHNW

Families in India:

Are You Really

Adding Value to Your Clients?

The Key Takeaways



1.

The Overlooked Need in Wealth Planning

In India, UHNW families face unique challenges in wealth preservation and growth. Yet, many of these needs remain unaddressed by the industry. Are you providing the tailored solutions they truly need?



2.

Understanding Family Dynamics

Wealth planning isn't just about investments; it's about understanding the intricate family dynamics, business structures, and long-term goals of UHNW families. Are you investing the time to understand these complexities?



3.

The Pitfalls of Last-Minute Planning

Estate planning and wealth transfer should never be an afterthought. Proactive planning is essential to avoid last-minute conflicts and ensure a smooth transition of wealth across generations.



4.

Collaborating with Experts

Effective wealth structuring often requires collaboration with tax advisers, private client lawyers, and other licensed professionals across jurisdictions like Singapore and the UAE. Are you leveraging the right expertise for your clients?



5.

Balancing Management and Ownership

As the next generation steps into leadership, conflicts can arise between management control and economic ownership. A nuanced approach is needed to align both generations on their vision for the family's legacy.



6.

Proactive, Customized Strategies

In 2024, the focus must be on proactive planning, clear communication, and customized strategies that reflect the unique needs of UHNW families in India. Are you prepared to meet these challenges head-on?

