

About Vistra

We are dedicated partners to our clients, simplifying the complexities of global business. We work alongside companies and private capital managers throughout their corporate and investment journeys.

From human resources and tax services to legal entity management and regulatory compliance, we address the operational and administrative challenges that can boost business growth.

With a team of over 9,000 experts across 50+ markets, we help accelerate progress, optimise processes, and minimise risks—enabling your ambitions to thrive anywhere in the world.

Estate and succession planning

Key objectives of succession planning:

- Possible avoidance from complicated process of obtaining confirmation from honorable court on the authenticity of the 'Will' commonly called as 'Probate'
- Possible protection of assets from Estate Duty (currently there is no Estate Duty in India)
- Possible protection from any unforeseen financial events
- Tax and operations efficiency for non-residents
- Structured succession for business and family assets
- Consolidation of family assets under a long-term legal structure
- Welfare & maintenance of family members
- Family & business continuity
- Growth of family assets under a tax efficient and long term structure
- Ensuring minimal administrative work for family members

Modes of estate and succession planning in India:

- Trusts - Activates during the lifetime of the person who intends to transfer assets into the trust
- Wills – Activates on demise of the person whose assets needs to be transferred on to the person as per his last wishes
- Nominations – Activates on demise of the person whose assets needs to be transferred as per his last wishes as a custodian

Our customised services for families include:

- Succession & estate planning

- Advice on combination of various legal structures aimed at protecting family wealth from personal and legal risks
- Setting up and management of private family trusts and other holding structures
- Drafting & execution of wills
- Inter-generational transfer of wealth
- Legal & tax assistance
- Consolidated reporting, monitoring of investments & accounting
- Philanthropy advisory
- Family communication involving setting up of family governance structures and family constitution
- Long term administration of the trust structure

Process flow

Phase 1: Signed engagement letter, preliminary KYC checks & payment of fees

Timeline: 2-3 days upon receipt of KYC information

Phase- 2: Conduct preliminary KYC checks on trust related parties

Timeline: 2 days upon submission

Phase 3: Preparation of Trust Documentation

Timeline: 7 to 30 days from the date of receipt of all the information

Phase 4: Final Client Approval (CAF)

Timeline: 3-5 days upon submission

Phase 5: Trust Kit

Timeline: 5 days

Escalation matrix

Level 1

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