

# PRIVATE CLIENT SERVICES

BDO INDIA  
2025



## 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 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 an international network of independent public accounting, tax and advisory firms. We support organisations with an unwavering focus on quality, industry expertise, and the innovative use of technology to deliver impactful solutions. Our commitment to people, clients, and communities is at the core of everything we do. With our people-first culture, we foster an environment where diversity thrives, growth is nurtured, and continuous learning drives lasting progress for a sustainable future.

**US\$ 15 BN**

GLOBAL  
REVENUE

**+7%**

REVENUE  
INCREASE

**1,800**

OFFICES  
WORLDWIDE

**166**

COUNTRIES &  
TERRITORIES

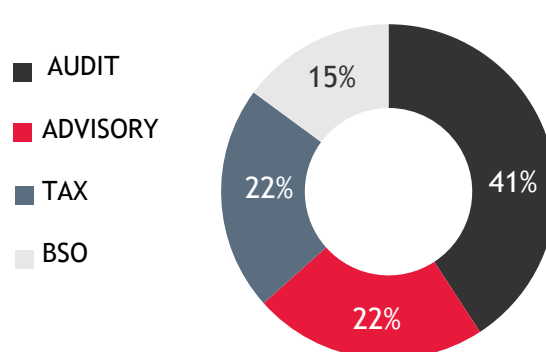
**119,611**

PEOPLE  
**+3.4%**

### PERCENTAGE REVENUE BY REGION



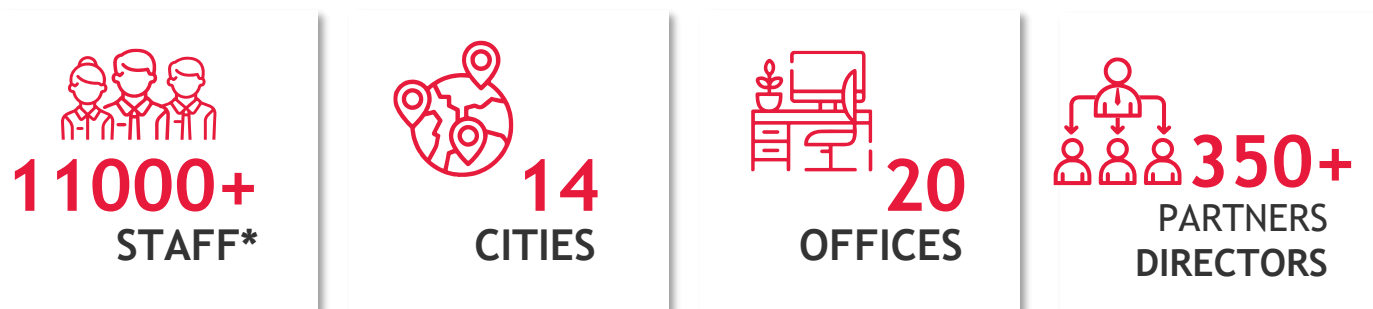
### FEE SPLIT BY SERVICE LINE



As of September 2024

## ABOUT BDO INDIA

BDO India offers Assurance, Tax, Advisory, Technology Products & Solutions, Digital Transformation, and Managed Services & Outsourcing to domestic and international clients across various industries. Bringing together expertise, innovatively driven and delivered through technology, we empower businesses to navigate their unique challenges with transformative, impactful, client-centric solutions. The team in India comprises over 11,000\* professionals, led by more than 350 Partners and Directors, operating out of 20 offices across 14 key cities.



ACTUARIAL SERVICES  
EXECUTIVE SEARCH  
TAX & REGULATORY SERVICES  
RESEARCH AND INSIGHTS  
MANAGED SERVICES  
INDIRECT TAX

ASSURANCE  
DEAL ADVISORY SERVICES  
BUSINESS ADVISORY SERVICES  
DIGITAL

\*Includes employees from BDO RISE and BDO EDGE

### OUR SERVICES

#### ASSURANCE

- Financial Statement Audit and Attestation Services

#### MANAGED SERVICES

- Accounting Advisory
- Compliance Management
- Finance & Accounting
- Human Resource Outsourcing (HRO) and Payroll
- Tax Compliance

#### BDO EXECUTIVE SEARCH SERVICES

- Board Services
- Executive Assessments
- Executive Search
- Forensic Talent Diligence
- HR Advisory

#### TAX

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

#### BDO DIGITAL

- Digital Services
- Technology Products and Solutions

#### ADVISORY

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

### 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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### Ahmedabad

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Office No. 601, Block A, S.G. Highway  
Makarba, Ahmedabad 380051, INDIA

### Bengaluru - Office 1

Prestige Nebula, Floor 3  
Infantry Road  
Bengaluru 560001, INDIA

### Bengaluru - Office 2

SV Tower, No. 27, Floor 3 & 4  
80 Feet Road, 6th Block, Koramangala  
Bengaluru 560095, INDIA

### Bhopal

11th Floor, EL-012 to EL-021,  
Bansal One Building,  
Rani Kamlapati Railway Station,  
Bhopal, Madhya Pradesh 462016,

### Chandigarh

Plot no. 55, Floor 5  
Industrial & Business Park  
Phase 1, Chandigarh 160002, INDIA

### Chennai

Olympia Cyberspace, Floor 10, Module 4  
No: 4/22 Arulayiammanpet, SIDCO Industrial  
Estate Guindy, Chennai 600032, INDIA

### Coimbatore

Pacom Square, Floor 3, 104/1, Sakthi  
Main Road, Bharathi Nagar, Ganapathy  
Coimbatore 641006, INDIA

### Delhi NCR - Office 1

Magnum Global Park, Floor 21, Archview  
Drive, Sector 58, Golf Course Extn Road  
Gurugram 122011, INDIA

### Delhi NCR - Office 2

Windsor IT Park, Plot No: A-1  
Floor 2, Tower B, Sector 125  
Noida 201301, INDIA

### Goa

BIZ - Nest, Floor 7  
A Wing, Sunteck Corporate Park  
Opp. Shram Shakti Bhavan, Patto  
Panaji, Goa 403001, INDIA

### Hyderabad

1101/B, Manjeera Trinity Corporate  
JNTU-Hitech City Road, Kukatpally  
Hyderabad 500072, INDIA

### Kochi

XL/215 A, Krishna Kripa  
Layam Road, Ernakulam  
Kochi 682011, INDIA

### Kolkata

Floor 4, Duckback House  
41, Shakespeare Sarani  
Kolkata 700017, INDIA

### Mumbai - Office 1

The Ruby, Level 9, North West &  
South East Wings, Senapati Bapat Marg  
Dadar (W), Mumbai 400028, INDIA

### Mumbai - Office 2

601, Floor 6, Raheja Titanium, Western  
Express Highway, Geetanjali Railway  
Colony, Ram Nagar Goregaon (E),  
Mumbai 400063, INDIA

### Mumbai - Office 3

Floor 20, 2001 & 2002 - A Wing, 2001-  
F Wing Lotus Corporate Park, Western  
Express Highway, Ram Mandir Fatak Road,  
Goregaon (E) Mumbai 400063, INDIA

### Mumbai - Office 4

2nd floor, Empire Complex  
414, Senapati Bapat Marg  
Lower Parel West,  
Mumbai 400013, INDIA

### Pune - Office 1

Floor 6, Building No. 1  
Cerebrum IT Park, Kalyani Nagar  
Pune 411014, INDIA

### Pune - Office 2

Floor 2 & 4, Mantri Sterling, Deep Bungalow  
Chowk, Model Colony, Shivaji Nagar  
Pune 411016, INDIA

### Vadodara

1008, Floor 10, "OCEAN", Sarabhai  
Compound, Nr. Centre Square Mall,  
Dr. Vikram Sarabhai Marg Vadodara  
390023, INDIA

Ahmedabad | Bengaluru | Bhopal | Chandigarh | Chennai | Coimbatore | Delhi | Goa | Hyderabad | Kochi | Kolkata | Mumbai | Pune | Vadodara

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