

HNI Family Back-office

Personal Accounting, Income Tax, Banking & MIS

All services under one roof



can there be a single solution to all my personal
Accounting, Banking & Tax compliance
requirements ?



- No time to compile data & account for personal transactions & investments?
- Is recording family Assets & Liabilities, Income & Expenditure a daunting task?
- Unaware of current value of your / family investments when required?
- Need professional & competent advice on foreign & Indian personal taxation?
- Is privacy & security of your personal income & investment data a concern?
- Wandering to find a single but infallible solution to record, account & monitor family wealth?



HNI Family Back-office

A credible, robust & definite solution



Data Compilation & Accounting

- Systematic compilation & recording of all income, investment & personal transactions
- Timely accounting of family assets & liabilities, income and expenditure
- Assistance for all banking and investment transactions & correspondences
- Periodic bank reconciliation



Foreign & Indian Tax Management & Compliance

- Advisory tax planning, Tax compliance & filing of tax returns
- Advisory on foreign remittances, FEMA compliances, foreign tax and double tax avoidance in India.
- Appearing for assessments, inquiry and scrutiny
- Regular reminders to timely discharge your tax obligations
- Regular updates on Income Tax assessment & refund status



Succession Planning Through Family Private Trusts

- Advisory on setting up, governance and management of family trust
- Taxation Aspects - Advisory & Compliance



Investment Tracking & Reporting

- On demand holding statement for all asset class including immovable

WHY US?

- property, jewelry, artifacts with current valuation of financial investments like shares, bonds, PMS, mutual funds, LIC, PPF, etc.
- On demand Income statement including long/short term gains
- Before event alert on tax efficiency of proposed transaction
- LTCG Statements compliant with current tax laws including grand fathering for effective tax planning



Banking & Operation Management

- Work is executed based on the in-sourcing model.
- Full-time, on-premises services of competent accountant for accounting & banking transactions.
- All correspondences for banking & investment transactions taken care.
- 24X7 access to services of experienced & competent professionals for tax consultations



Data Privacy & Security

- Your data is stored locally to ensure controlled access
- Strong controls over data access & storage restricts access to information on personal transactions & family wealth from company staff
- Investment info. on your mobile app for monitoring on the go!

- Trained & experienced team having over a decade of experience in managing **HNI Family back-office**

- Unique in-sourcing model ensures on-premises availability of accountant for your convenience

- Consulting services of competent account manager on call

- Direct access to partner who himself directs & monitors deliverables

- Professional advice & valuable insights on tax related matter

- Stop paying separately for each entity on Accounting, MIS Reporting, return filing & tax advisory

- We offer our services for a fixed fee, based on net worth, irrespective of numbers of entities

- Complete security & privacy of your personal and financial data.

- Highest standards of credibility & Integrity – We are a team of professionals with over three decades of experience in accounting & tax related areas.

Get in touch with
our client relationship manager

Miss. PRIYA SHAH

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OTHER SERVICES WE OFFER



Data Analytics - Training & Consulting

- Internal Audit
- Business Analysis & Dashboard Reporting
- Business/ Financial Modeling



Information Systems

- System Audit
- Systems Design & Implementation
- Post Implementation Review



Investigation Services

- Forensic Accounting
- Fraud Investigation



Due Diligence

- Financial & Tax due diligence
- Deal structuring & Valuation



Income Tax

- Compliance & Advisory
- Scrutiny & Appeal
- NRI Tax Compliance
- ITR & TDS Return



Company Law

- Company/ LLP/ Partnership firm set up
- ROC Filing
- Business Entity Structuring



GST

- Consulting & Advisory
- Return Filing