

**Deloitte.**  
Private



**The Thriving Family Enterprise**  
Leading with purpose

# The What

What is needed to help build a future-proof family enterprise?

Family enterprises represent the interconnected interests of family, ownership and business. **Thriving family enterprises lead with a purpose-led approach**, raising the bar to achieve financial success and meet human, social, and legacy goals. How prepared are you to tackle the challenges and harness the opportunities ahead?

More than ever, **trust**—with your family, business, and society—is an

integral part of family enterprises and the **values** displayed. Your **legacy** is tied to your family enterprise's **vision** for tomorrow, and your success depends on navigating the unique dynamics of your family and business.

From governance to multigenerational planning, navigating risk to unlocking your competitive advantage, **it's time to accelerate** your growth, capital and wealth potential.

*Our 360-degree approach for future proof family enterprise*



# The Why

Why is Deloitte Private the right choice?

Deloitte Private guides family enterprises to thrive across generations by navigating connected facets of family, business and ownership. We understand that purpose is at the center of all that you do—fuelled by trust, a strong vision, your legacy and core values. We know you are focused on growing and protecting your family enterprise well into the future.

We're there with you every step of the way—from growth and evolution, through sale or succession of a family business, to the development of family and business governance structures and the creation and management of a family office.

Our global network of practitioners bring you the breadth of Deloitte to help you navigate the ever-expanding complexities and opportunities for your family enterprise. Together we can define what you want to achieve, as well as develop tailor-made solutions to help meet your family and business objectives to achieve lasting success.

# The How

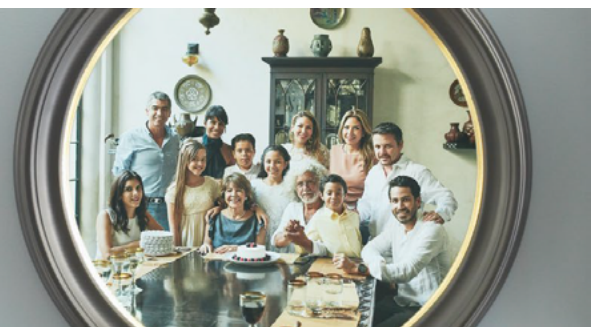
How can Deloitte Private help you?

With years of experience serving family enterprises in more than 140 countries, Deloitte Private brings multidimensional perspectives—a 360-degree view—across all the challenges and opportunities you might face as a family enterprise.

Our multidisciplinary and purpose-led approach ensures that we bring the right solutions to you at the right time—through a holistic lens of understanding the specific family enterprise issues and dynamics you might be facing. Through our Global Family Enterprise Center of Excellence we bring together our global network of trusted advisors, collective leading practices, sector expertise, and digital tools to develop world-class, bespoke solutions, and datadriven insights.

Our people bring not only their deep experience and connections to other family enterprises, but also the full Deloitte organization to you.

*With years of experience serving family enterprises in more than 140 countries, Deloitte Private brings multidimensional perspectives—a 360-degree view—across all the challenges and opportunities you might face as a family enterprise.*



# Our global family enterprise approach addresses your most pressing issues using a 360-view



## Governance

- How do we achieve family harmony and business performance? **Family and business governance structure and practices, family council**
- Do we have a clearly articulated and understood purpose for our family enterprise? **Vision, family constitution and agreement**
- How do we structure our business to meet family and business objectives? **Business ownership structure, management incentives, exit planning**
- How do we establish transparency and accountability to manage family dynamics through good and bad times? **Decision-making responsibilities and authorities, communication and dispute resolution**

## Multigenerational

- How do we ensure a successful transition of family, business and ownership, for both family members and non-family? **Continuity planning, succession planning, conflict management**
- How do we develop and support our rising generation to succeed in their chosen endeavors? **NextGen development and education**
- How do we engage and empower the NextGen of family and non-family employees? **Future management structure**

## Wealth

- How do we create wealth outside of the operating business? **Family office design and management, wealth management and education**
- How do we serve our community and contribute to causes that are important to our family? **Philanthropy, social impact**
- How do we structure/align a family member's investment strategy with our overarching family values and build a resilient portfolio? **Investment strategy, asset diversification**
- How do we optimize tax position across jurisdictions? **Tax effectiveness**
- How do we protect and structure our wealth to meet our objectives and mitigate uncertainty? **Estate planning, legal agreements**

## Risk

- How can we build and protect the reputation of our business and family? **Reputation management**
- How do we prepare for and navigate unforeseen challenges? **Crisis management, physical security**
- How do we leverage technology in a safe way? **Cyber risk**
- How can we comply with the requirements of every country in which we reside, invest or own property? **Regulatory compliance**

## Capital

- What capital needs will our family and business face in the near and long term? **Access to capital**
- How do we manage cash or access debt to withstand market downturns and capitalize on market opportunities? **Cash management, liquidity planning**
- How do we set up and manage statutory obligations efficiently? **Tax structuring, accounting operations, forensics**

## Competitiveness

- How do we reimagine our business to harness the power of technology? **Digital transformation**
- How do we keep our organization lean, do more with less and improve productivity? **Business transformation, operational excellence, cost reduction, organic growth**
- How do we get relevant, timely information to make informed decisions? **Data analytics**
- How do we attract and retain the best talent inside and outside of the family? **Human capital and organizational design, culture, workforce of the future, incentives and rewards**

## Growth

- How do we anticipate and plan for disruption and competition? **Innovation and ecosystem**
- How do we ensure our family and business are positioned for success and will achieve our purpose? **Family and business strategic planning**
- How do we make the right inorganic growth choices? **M&A life cycle, acquisitions and divestitures, transactions and exit planning**
- How do we see, find and access global opportunities? **Expansion, offshore investments**
- How do we continue to meet our customers' needs? **Customer experience, market sensing**

# Contacts



## Wolfe Tone

Global Deloitte Private Leader  
[wtone@deloitte.com](mailto:wtone@deloitte.com)



## Adrian Batty

Global Family Enterprise Leader  
[abatty@deloitte.com.au](mailto:abatty@deloitte.com.au)



## Melanie Temnycky

Global Family Enterprise COE Lead  
[mtemnycky@deloitte.com](mailto:mtemnycky@deloitte.com)

[www.Deloitte.com/familyenterprise](http://www.Deloitte.com/familyenterprise)

Deloitte refers to one or more of Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms, and their related entities (collectively, the “Deloitte organization”). DTTL (also referred to as “Deloitte Global”) and each of its member firms and related entities are legally separate and independent entities, which cannot obligate or bind each other in respect of third parties. DTTL and each DTTL member firm and related entity is liable only for its own acts and omissions, and not those of each other. DTTL does not provide services to clients. Please see [www.deloitte.com/about](http://www.deloitte.com/about) to learn more.

Deloitte is a leading global provider of audit and assurance, consulting, financial advisory, risk advisory, tax and related services. Our global network of member firms and related entities in more than 150 countries and territories (collectively, the “Deloitte organization”) serves four out of five Fortune Global 500® companies. Learn how Deloitte’s approximately 330,000 people make an impact that matters at [www.deloitte.com](http://www.deloitte.com).

This communication contains general information only, and none of Deloitte Touche Tohmatsu Limited (“DTTL”), its global network of member firms or their related entities (collectively, the “Deloitte organization”) is, by means of this communication, rendering professional advice or services. Before making any decision or taking any action that may affect your finances or your business, you should consult a qualified professional adviser.

No representations, warranties or undertakings (express or implied) are given as to the accuracy or completeness of the information in this communication, and none of DTTL, its member firms, related entities, employees or agents shall be liable or responsible for any loss or damage whatsoever arising directly or indirectly in connection with any person relying on this communication. DTTL and each of its member firms, and their related entities, are legally separate and independent entities.

Deloitte Private is the brand under which firms in the Deloitte network provide services to privately owned entities and high-net-worth individuals.