

**Deloitte.**  
Private



**The Thriving Family Enterprise**  
Leading with purpose

**MAKING AN  
IMPACT THAT  
MATTERS**  
*since 1845*

# 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 more than 175 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 data driven insights.

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

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## 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**

### 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**

### 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**



### 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**

### 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**

### 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**

# Our Contacts



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