



Deloitte.
Private

Deloitte family office services

Differentiated capabilities to serve
family operations


SECOND EDITION



LIFE EVENTS

TRANSFORMING PIVOTAL MOMENTS INTO OPPORTUNITIES

Significant life events form a critical part of the family office journey. These events can profoundly impact office operations and the family's legacy. Deloitte understands the intricacies of these pivotal moments and, as your trusted advisor, provides customized services to help you navigate these transitions smoothly. From strategic sessions through our lab experiences, to legacy assessments to further continuity and growth, to tax controversy services for managing potential challenges from tax authorities—we bring the experience and guidance to transform life events into potential opportunities.

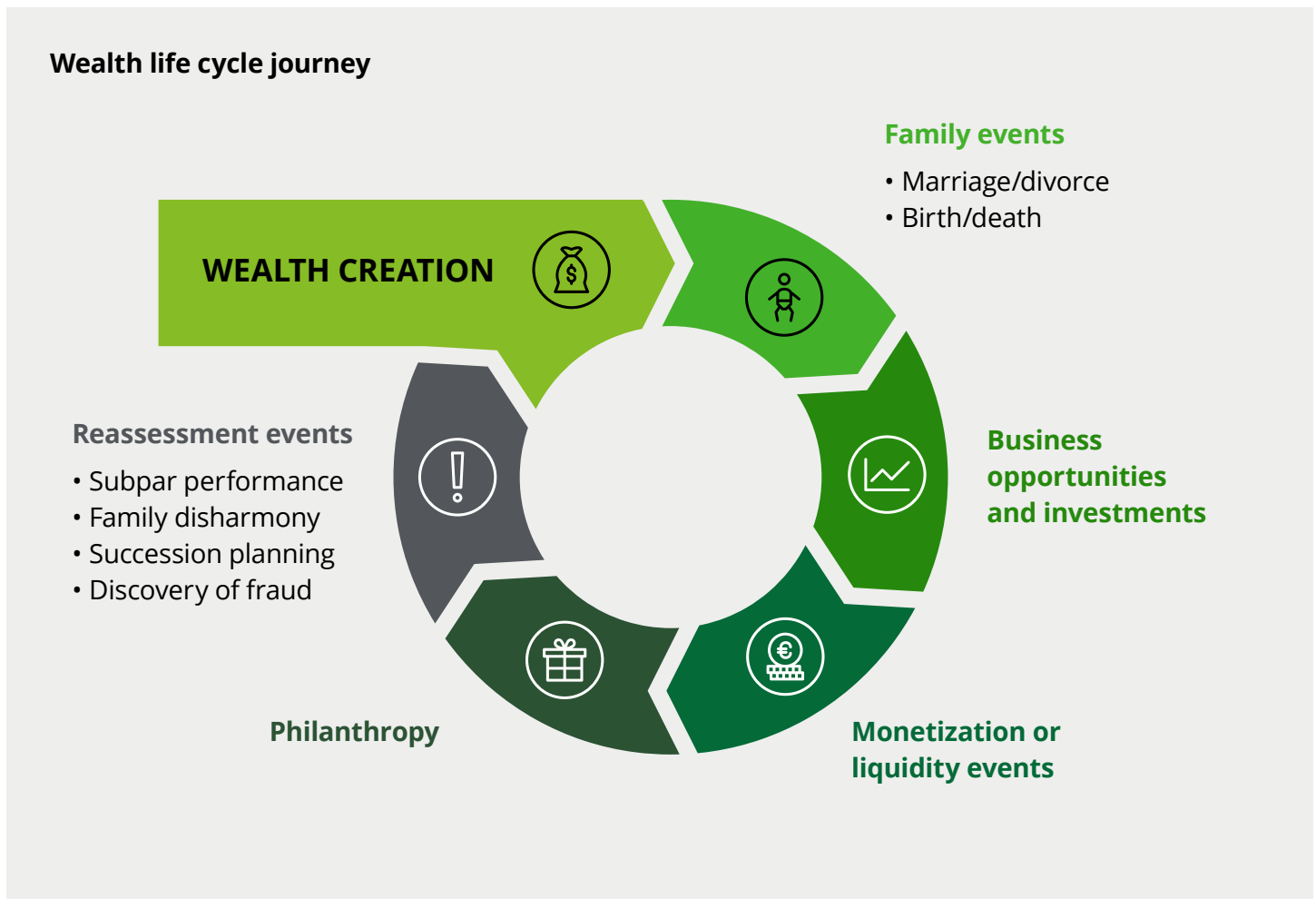


Family office lab offerings

STRATEGIC SESSIONS FOR TRANSFORMATIVE GROWTH

Family offices typically face unique challenges at every stage, from formation and transition to transformation and navigation of significant life events within the family it serves. Deloitte’s Lab experiences are designed to help your team expand from “business as usual” and embrace new ways of thinking to achieve breakthrough results at any stage.

We work directly with you to create a tailored experience that addresses your unique challenges, enabling family office executives and teams to engage in strategic sessions that cultivate innovative thinking—and empower them to navigate the ever-evolving financial landscape with confidence.



OUR SERVICES

01

Executive labs

Transitioning to a new executive role in a family office involves the delicate balance of time, talent, and key relationships. Our labs facilitate a deep dive into these aspects, helping executives prioritize their responsibilities and construct a 180-day roadmap tailored for effective forward momentum.

02

Formation labs

Establishing a family office is a complex, multifaceted process. Collaborating with families and advisors, we can help you through the financial, logistical, and family dynamic intricacies involved in forming a family office, helping to build consensus and enable informed, thoughtful decision-making.

03

Transformation labs

When your family office seeks to pivot or enhance its operations, our transformation labs provide a focused setting to explore new possibilities. Whether it's talent development, process refinement, or technological integration, we tailor our sessions to your specific challenges and objectives.

04

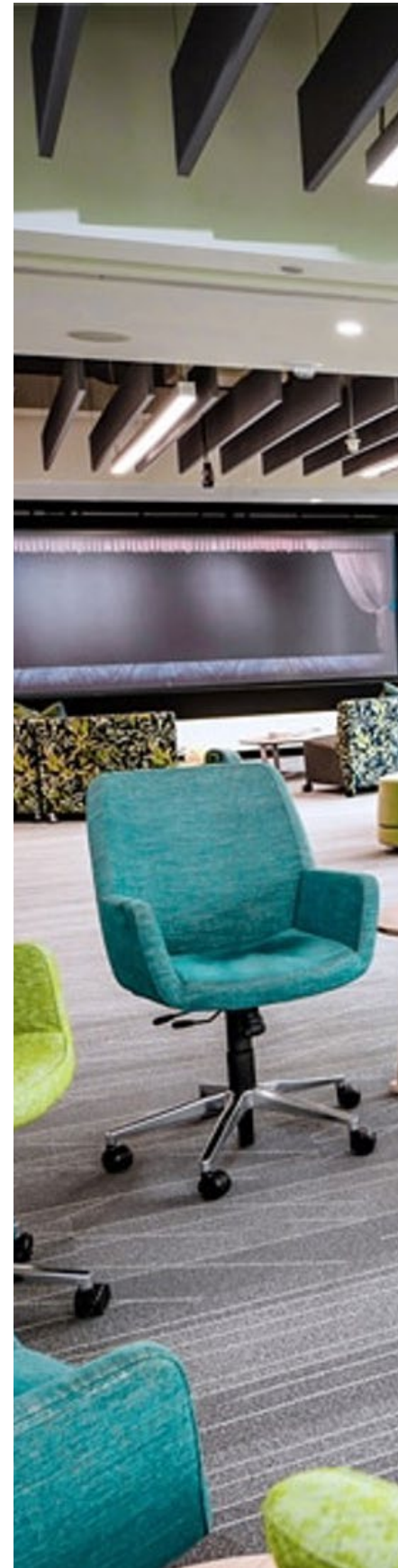
Life event labs

Life events, such as a major acquisition or liquidity event, marriage or divorce, or death of a principal, can bring about significant shifts within a family office. Our labs are specifically designed to help families and offices make critical decisions swiftly and efficiently, providing clarity and direction during pivotal moments.

05

Succession workshop

Effective succession planning is crucial for continuity and stability within an organization as it prepares for the effective transfer of knowledge and responsibilities. Our workshop is designed to assist family offices in navigating the complexities of leadership change. In a confidential environment, you can explore key challenges and issues and develop an actionable plan for an effective transition.



A PLACE BUILT TO FACILITATE YOUR SUCCESS



Research-based content

Frameworks built on empirical data, research, focused experience, and cumulative learnings from more than 8,000 sessions.



Immersive methods and exercises

Exercises based on behavioral research and team dynamics, and on conversations with your people.



Relevant subject matter specialists

Diverse perspectives from specialists selected because they know your challenge, industry, or business.



Highly trained Deloitte facilitators

Business practitioners specializing in intervention, disruption, alignment, and consensus building.

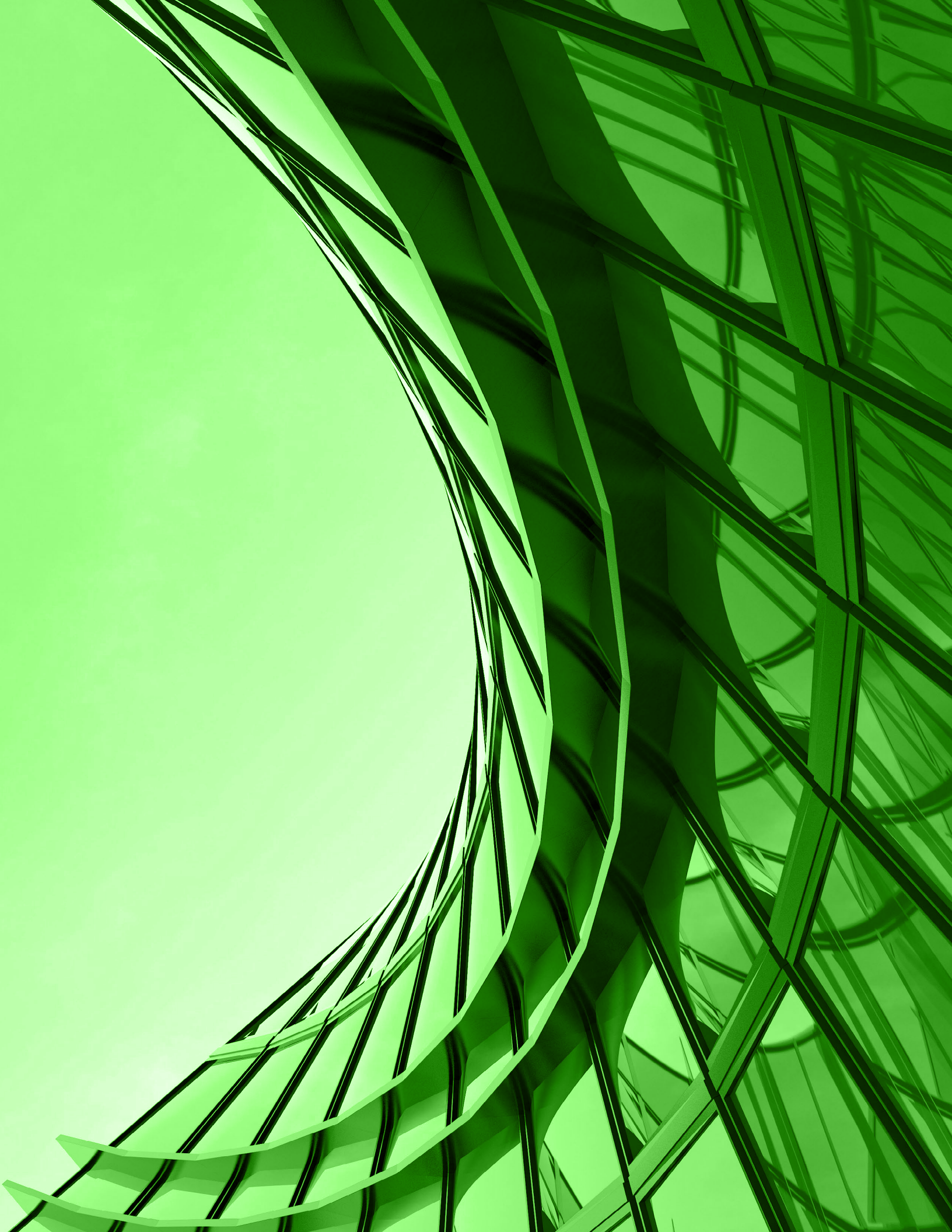


Custom-designed environment

Movable panels, flexible furniture, and an intimate space built to spark conversation.

Through immersive one- or two-day interactive sessions, Deloitte facilitators use tested methodologies—such as design thinking, innovation theory, group dynamics, and behavioral science—to help family members, family office executives, and other key stakeholders accelerate decision-making and outline a vision. The resulting insights can help participants align on important perspectives and expectations, assess the effectiveness of family office critical processes, and then prioritize opportunities for transformative change.

The outcome for our Deloitte lab experiences is an action plan that identifies key milestones, deliverables, and owners to move the opportunities forward.



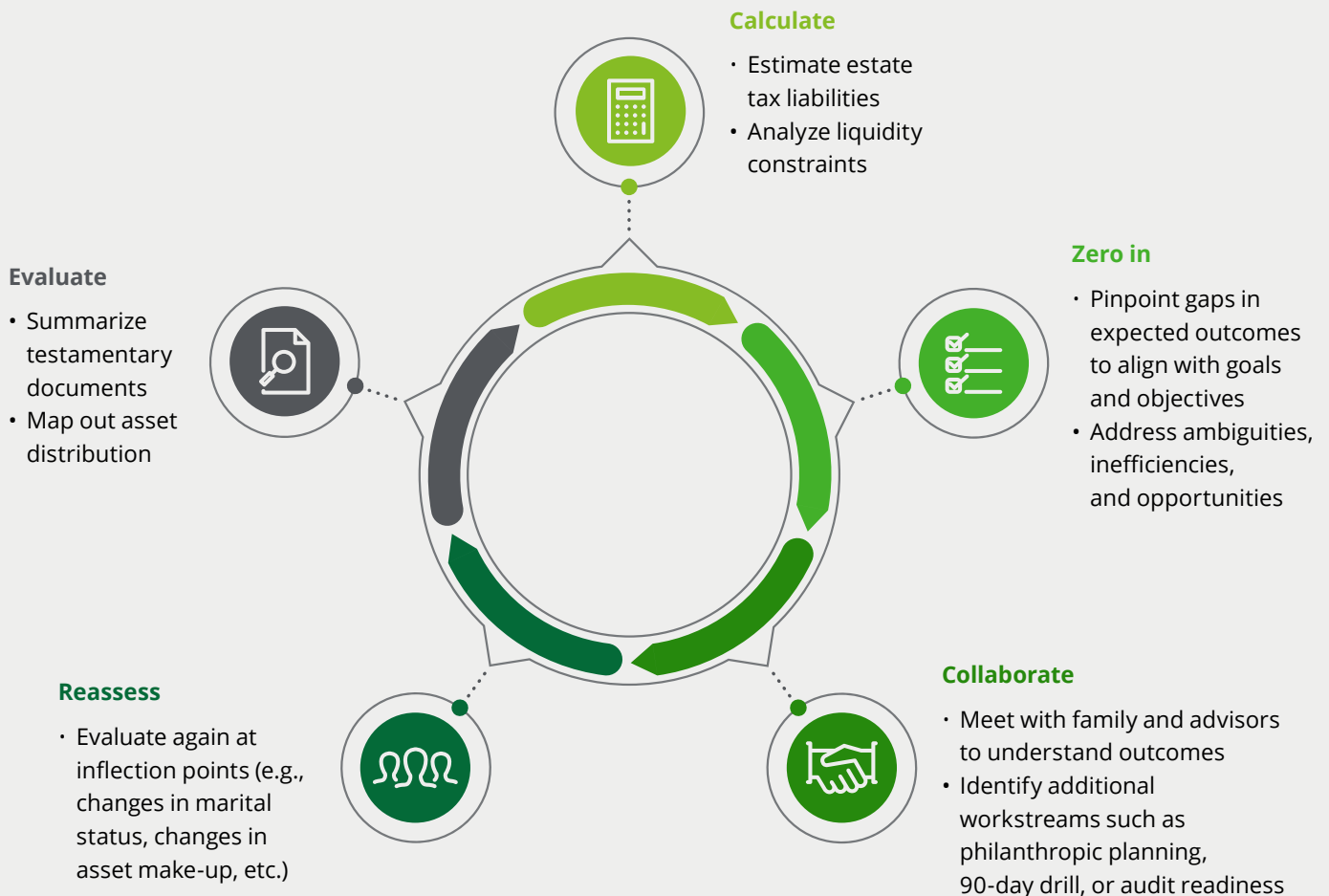
Legacy assessments

CRAFTING LEGACIES THAT LAST

While death and taxes are inevitable, their consequences needn't be a surprise. A practical, step-by-step action plan to navigate the complexities of succession and estate tax liabilities can deliver peace of mind and continuity for the family and the family office during generational transitions. We look beyond the tax burden to address other potential consequences, recognizing that effective tax planning does not come at the expense of equally important outcomes.

Deloitte can help you analyze whether your legacy is preserved and your family office is poised for resilience and growth with proactive planning and audit readiness.

The legacy assessment cycle



OUR SERVICES

90-day drills

Identify essential financial, accounting, regulatory, and administrative actions needed immediately after an individual's passing.

Asset disposition

Analyze the disposition of specific, hard-to-value assets like large equity positions and unique real estate holdings.

Generational transition strategies

Address complexities in business and family office succession.

Audit preparation

Review reporting from prior gifts made to identify potential disclosure and audit risks.

Financial implications

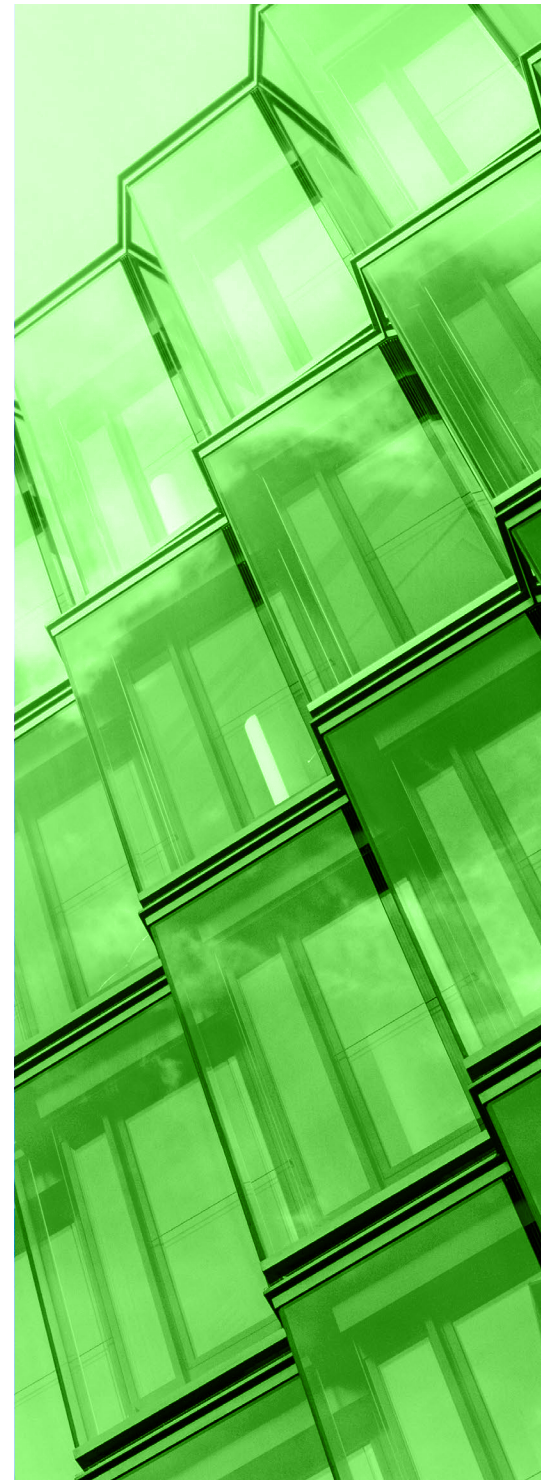
Review estate tax liabilities and help analyze liquidity sources for these costs and other administration expenses.

Estate plan execution

Utilize estate planning legal documents and client financial statements to identify and quantify the flow of assets to beneficiaries, supporting alignment with the client's goals and objectives.

Tax planning

Utilize gift tax and generation skipping transfer tax exemptions and charitable planning to shift assets and potential appreciation outside of the donor's estate.



Tax controversy services

ASSISTANCE IN THE FACE OF ADVERSITY

Wealthy individuals continue to be examined, often very thoroughly, by taxing authorities. The IRS is focusing on family office’s financial affairs—and examinations increasingly expand to include other family members and other family entities.

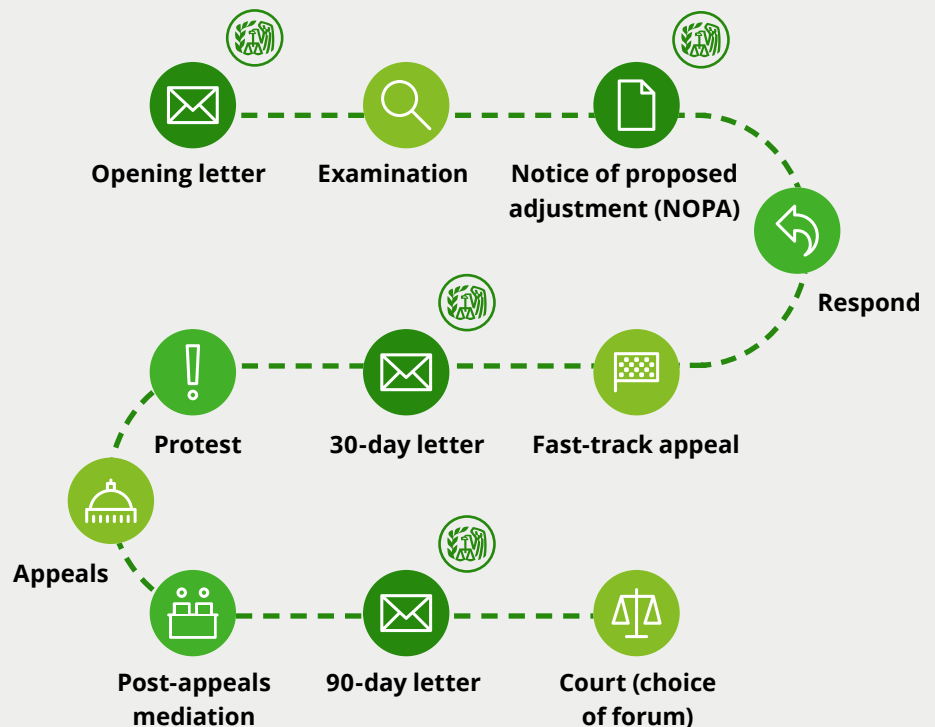
The IRS’ Global High Wealth initiative specifically aims to examine tax compliance across sophisticated financial networks, including those operated by many family offices. Moreover, we continue to see state taxing authorities perform increasingly complex examinations of offices across our client base.


Deloitte is your trusted advisor as you navigate this complicated environment. Our tax controversy specialists offer family office-specific guidance to help you confidently navigate these challenges while also assisting with notices and other controversy issues that you may have with the IRS and state taxing authorities.

The tax controversy process

Questions to consider:

- How can you prepare for an audit?
- How long should you retain records in preparations for an audit?
- What types of transactions might trigger an audit?
- What steps should you take if you receive a notice for examination?
- How could tax enforcement change in the coming years?



 IRS documentation

OUR SERVICES

Deloitte's approach helps family office clients maneuver the intricacies of tax controversies, from preparation to resolution, for a smoother process and more peace of mind.

ONE

Exam readiness assessments

- Help clients prepare for potential exams by anticipating examination areas and consulting on contemporaneous transaction documentation and document retention policies.
- Conduct essential interviews to gather information.
- Implement strategies for quick document retrieval and submission.

TWO

Examination assistance

- Provide assistance throughout IRS and state examinations, with a team of professionals dedicated to this specialization.
- Address and resolve complex examination-related questions, offering clarity and compliance.
- Specialize in handling Global High Wealth Initiative examinations, offering tailored services for wealthy individuals.

THREE

Service center issues

- Assist in resolving IRS notices and addressing payment issues and discrepancies.
- Help clients navigate and resolve penalties and receive fair treatment.
- Provide approaches for tax return processing and other service center-related challenges.

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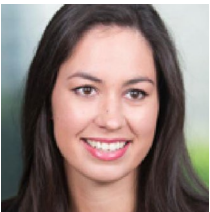
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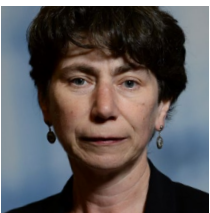
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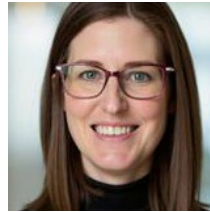
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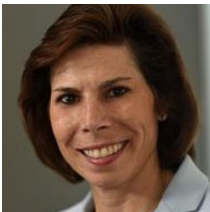


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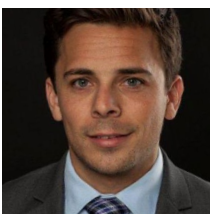


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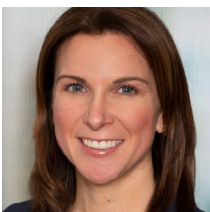


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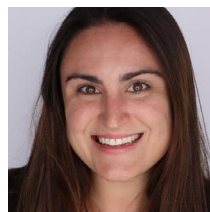


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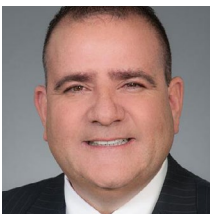
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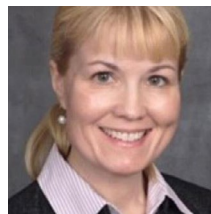
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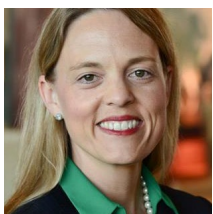


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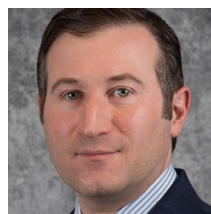


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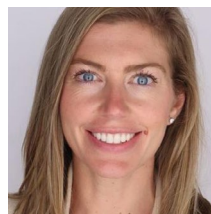


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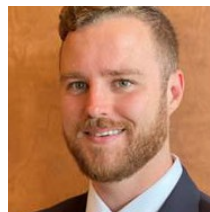


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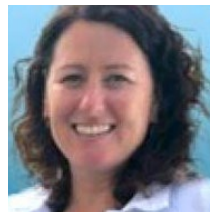


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