



Deloitte Family Office Succession Workshop

Transition *with* vision

Effective succession planning is crucial for determining continuity and stability within an organization, as it prepares for the effective transfer of knowledge and responsibilities. Whether you're considering recruiting a successor externally or developing an internal candidate, strategic succession planning is essential to maintaining stability and driving continued success.

Deloitte's Family Office Succession 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. Our broad-based approach allows us to provide you with the insights and tools needed to make informed decisions and safeguard the future of the organization.

Differentiated succession insights

Deloitte's Family Office Succession Workshops offer tailored insights to support future leaders at any stage of your transition journey.

- **Pre-successor identification:** Assists current executives in focusing on assessing the current state, engaging with HR and recruiting, planning for legacy, and developing talent
- **Post-successor selection:** Assists executives in conducting knowledge transfer and enabling a smooth transition and onboarding process
- **New leader:** Assists executives in refining their strategies, addressing emerging challenges, and enabling sustained success in their new roles

Strategic, visionary succession planning

In a Succession Workshop, the identified successor and outgoing Executive collaboratively define how the family office delivers value today and shape a vision for the future. They gain insights into trends and perspectives from the marketplace, enabling the family office to remain competitive and forward-thinking.

We'll spend time discussing your function – as well as relationships with key stakeholders – to enable a smooth leadership transition, reinforce current strengths, and align the organization with future opportunities and market expectations.

The CTO Program

A roadmap for the future

Deloitte's Family Office Succession Planning Workshop provides leadership teams with a practical blueprint for overcoming transition challenges. With actionable strategies and insights that can be implemented immediately, you can enable your organization to be prepared with an effective succession plan. We can add value through:



Research-based content built on empirical data and cumulative learnings from more than 3,500 sessions



Immersive methods and exercises based on behavioral research and team dynamics



Relevant subject matter resources that know your challenge, industry, or business



Highly trained facilitators who specialize in intervention, disruption, alignment, and consensus-building



A custom-designed environment featuring movable panels, flexible furniture, and an intimate space built to spark conversation

"The succession workshop allowed us to uncover insights around our stakeholders, our team, and our operating model that we may not otherwise have thought through."

Your breakthrough is waiting.

Take the first step toward framing your succession plan.

For more information:

Bridget Kerbyson

Managing Director
CTO Program and Tax Lab Experiences
Deloitte Tax LLP
brcurtis@Deloitte.com

Lauren Wells

Senior Manager
CTO Program and Tax Lab Experiences
Deloitte Tax LLP
lwells@deloitte.com

Alexis Fonow

Senior Manager
CTO Program and Tax Lab Experiences
Deloitte Tax LLP
abento@deloitte.com

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IMPACT THAT
MATTERS**

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