



KPMG Succession Tool

KPMG Law - 2023



Managing successions to support your clients

You take great care providing the best service for your private clients, wherever they are across the globe.

But when it comes to managing difficult situations in the relationship cycle – such as the death of a client domiciled abroad – are you able to respond to your clients efficiently and accurately during this sensitive time?

Even the most competent and experienced legal team can struggle with different issues:

- Sifting through the vast amount of data that is not verified
- Researching often across multiple, outdated sources in different languages
- Spending precious budget on outsourcing this to lawyers on a local level, requiring huge coordination efforts for your team



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Partner, Attorney-at-Law
Head of KPMG Law Switzerland

01

The solution



The KPMG Succession Tool: Clarity over complexity

At KPMG, we made it our mission to help banks, wealth managers, lawyers and insurance companies to dramatically reduce their time, effort and spend and deliver the level of service that private clients expect.

KPMG's Succession Tool is an online platform that gives legal and financial professionals worldwide access to essential information they need to manage successions for private clients with last residence abroad.

The tool answers pressing questions that arise in the unfortunate case of a client's death, allowing you to:



Identify who is entitled to **information rights**,



Determine who is entitled to **disposition rights**, e.g. heirs, executor, notary or others, and



Understand which **legitimating documents** the involved party must present for this purpose, in English and local language and with samples as well as explanations.



Structured by country, the information is provided through an online platform, and is based on the corresponding foreign **succession law**. Users have access to standardized, easy to read information in English – **for almost 60 countries**.

KPMG Succession Tool: Gains for users

01

Time-saving,
easy-to-use tool

02

Global web-based
access to your
chosen jurisdictions

03

Up-to-date and
legally verified
content

04

Standardized
format across all
countries – in
English

05

Simple and
transparent cost
structure

06

Access to KPMG's
international
succession
professionals



KPMG Succession Tool - Bring value to your clients

As an extension of your internal resources, the Succession Tool helps legal teams optimize research and serve clients accurate and trustworthy advice more efficiently.

Unlimited hours saved

Empower your legal teams to research more efficiently and save precious time when advising your most valued clients.

100+

satisfied users



60 countries available

Pick and choose from a wide choice of countries of residence.



Information compiled by over 360 legal professionals

Our global team ensures the data in the tool is precise and up-to-date, and we have a vast network of over 3000 legal experts working together for KPMG Law across the globe.

KPMG Succession Tool- User feedback

We stay close to our users and regularly ask for feedback.

User-friendly
“The Succession Tool is very user-friendly – we find the country template structure really helpful.”

Reassuring
“It is reassuring to know that the content is regularly updated.”

Easy access
“The rapid access to information saves us time”.

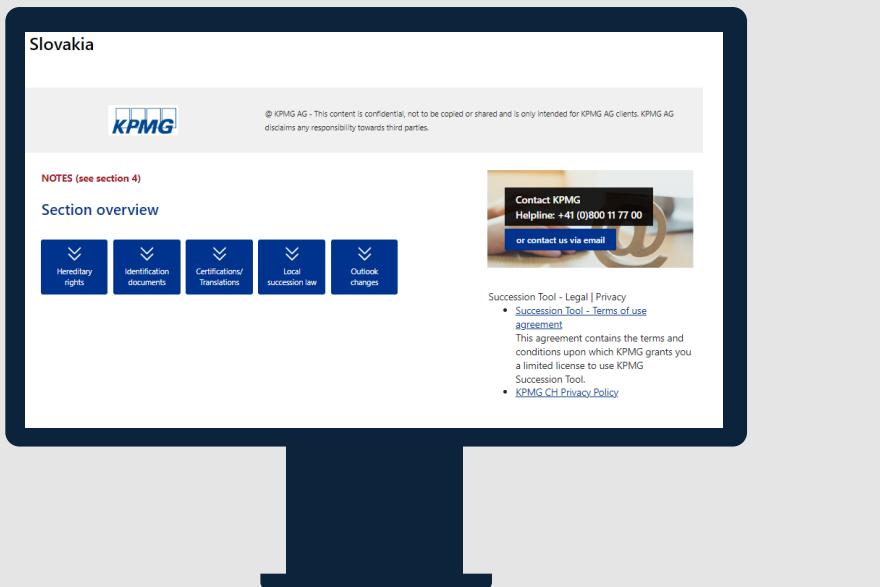
Complete content
“The information contained in the country templates is very detailed and complete.”

02

Access



Online platform = No complex IT set-up required



No software needed

Designed specifically for the world's top wealth managers, the tool needs no specific IT set-up and is hosted in our environment.



Web-based for instant access

Ready to use with no set-up, with simple and fast login.



Unlimited number of users

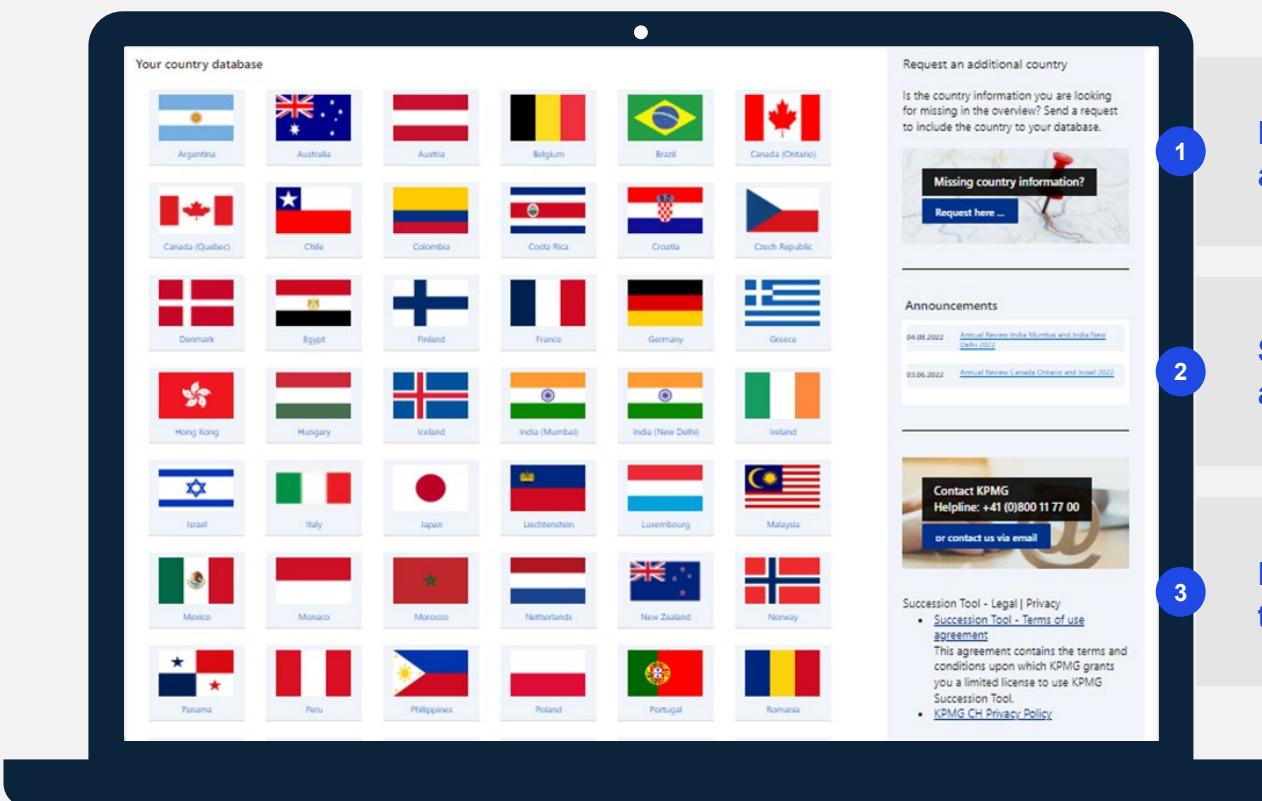
You can simply give access to your entire team, wherever they are in the world, whether you have 3 users or 100.



Country packages are tailored to your global footprint

You can choose the countries that interest you most, add new countries or reduce as your client portfolio evolves.

Homepage tailored to your global reach



The tablet screen shows a 'Your country database' section with a grid of 48 flags, each with a country name below it. To the right are three callout boxes numbered 1, 2, and 3.

- 1 Request an additional country as your portfolio evolves**
A box with a map and a red pin, with a 'Missing country information?' button and a 'Request here ...' link.
- 2 Stay informed with the latest announcements as they happen**
A box showing 'Announcements' with two links: '04.08.2022 Annual Review India Mumbai and India New Delhi 2022' and '03.06.2022 Annual Review Canada Ontario and Israel 2022'.
- 3 Experts on hand directly via the tool or call the hotline**
A box with a 'Contact KPMG' section (Helpline: +41 (0)800 11 77 00, or contact us via email), a 'Succession Tool - Legal | Privacy' section (with a 'Succession Tool - Terms of use agreement' link), and a 'KPMG CH Privacy Policy' link.

03

Countries
available



Countries / regions available - January 2023



Argentina	Croatia	Iceland	Mexico	Portugal	United Arab Emirates
Australia, NSW	Czech Republic	India Mumbai	Monaco	Romania	Ukraine
Austria	Denmark	India New Delhi	Morocco	Russia	UK (England & Wales)
Belgium	Egypt	Republic of Ireland	Netherlands	Serbia	Uruguay
Brazil	Finland	Israel	New Zealand	Singapore	USA (California)
Canada Ontario	France	Italy	Norway	Slovakia	Venezuela
Canada Quebec	Germany	Japan	Panama	Spain	Vietnam
Chile	Greece	Liechtenstein	Peru	Sweden	
Colombia	Hongkong	Luxembourg	Philippines	Thailand	
Costa Rica	Hungary	Malaysia	Poland	Turkey	

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Your KPMG contacts



Your KPMG Law experts



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