



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- Researching often across multiple, outdated sources in different languages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



Adrian Tuescher

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 **legitimizing 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

04

Standardized
format across all
countries – in
English

05

Simple and
transparent cost
structure

06

Access to KPMG's
international
succession
professionals

03

Up-to-date and
legally verified
content



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

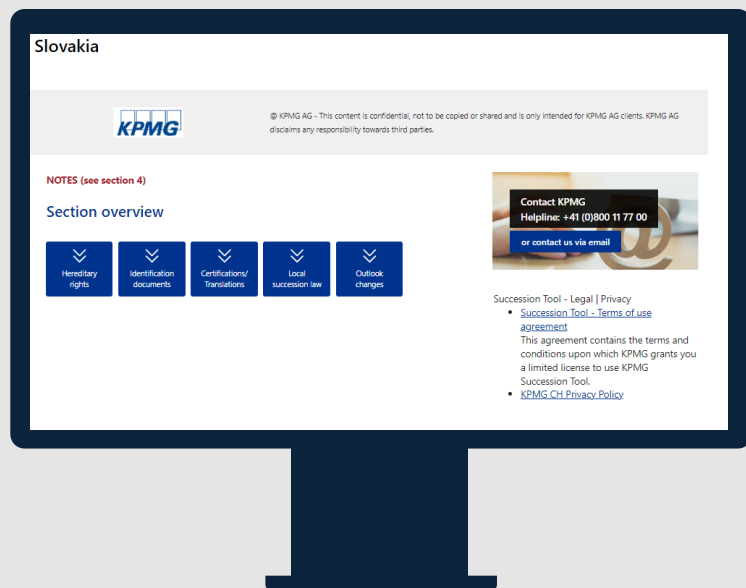
“The information contained in the country templates is very detailed and complete.”

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

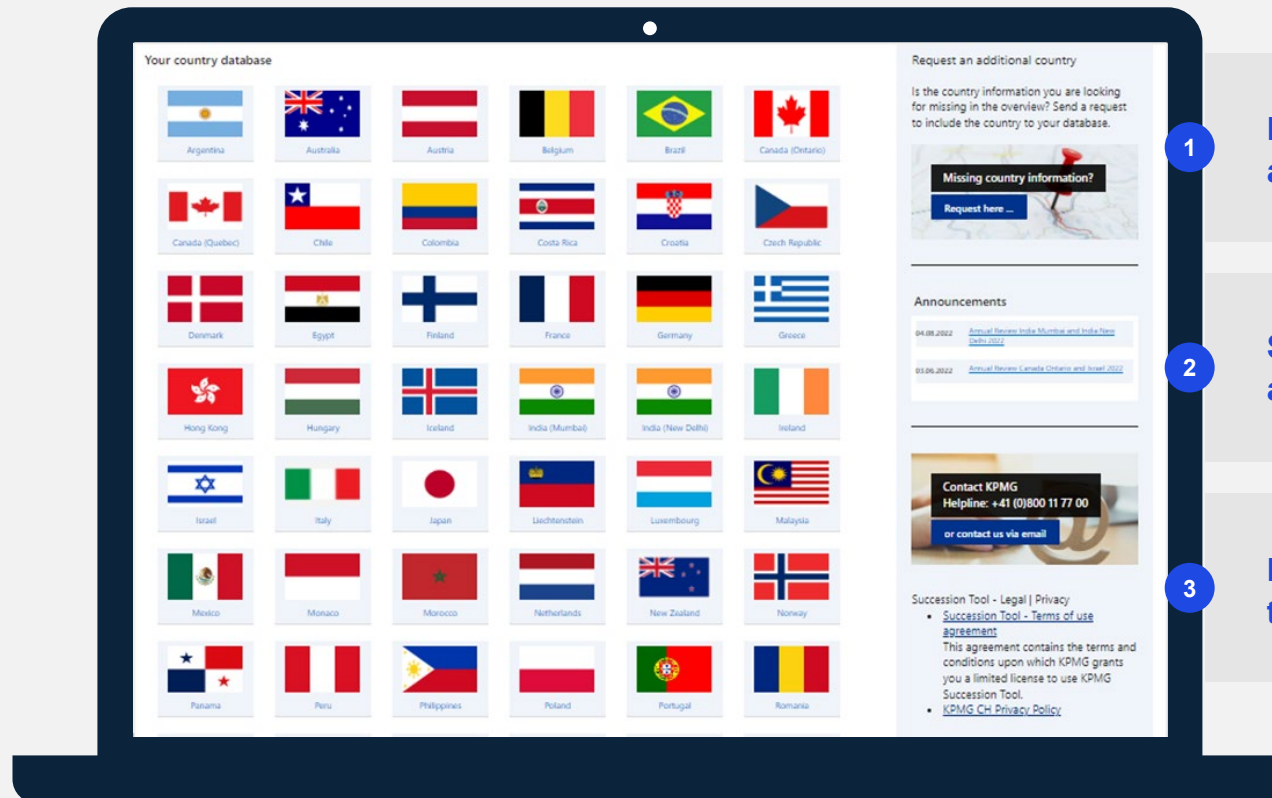
You can simply give access to your entire team, wherever they are in the world, whether you have 3 users or 100.



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



1 Request an additional country as your portfolio evolves

2 Stay informed with the latest announcements as they happen

3 Experts on hand directly via the tool or call the hotline

03

**Countries
available**



Countries / regions available – January 2023



Argentina

Australia, NSW

Austria

Belgium

Brazil

Canada Ontario

Canada Quebec

Chile

Colombia

Costa Rica

Croatia

Czech Republic

Denmark

Egypt

Finland

France

Germany

Greece

Hongkong

Hungary

Iceland

India Mumbai

India New Delhi

Republic of Ireland

Israel

Italy

Japan

Liechtenstein

Luxembourg

Malaysia

Mexico

Monaco

Morocco

Netherlands

New Zealand

Norway

Panama

Peru

Philippines

Poland

Portugal

Romania

Russia

Serbia

Singapore

Slovakia

Spain

Sweden

Thailand

Turkey

United Arab Emirates

Ukraine

UK (England & Wales)

Uruguay

USA (California)

Venezuela

Vietnam

04

Your KPMG contacts



Your KPMG Law experts



**Adrian
Tuescher**

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



**Nathalie
Faessler**

Assistant Manager, Attorney-at-Law
KPMG Law Switzerland
Private Clients Legal Services



**Hilary
Marston**

Assistant Manager, Sales Consultant
KPMG Tax & Legal, KPMG Law Switzerland



Some or all of the services described herein may not be permissible for KPMG audit clients and their affiliates or related entities.



kpmg.com/socialmedia

This non-binding proposal is made by KPMG AG, a Swiss corporation and a subsidiary of KPMG Holding AG, which is a member firm of the KPMG global organization of independent firms affiliated with KPMG International Limited ("KPMG International"), a private English company limited by guarantee, and is in all respects subject to the negotiation, agreement, and signing of a specific engagement letter or contract including agreement of the scope of services and to the satisfactory completion by KPMG AG of applicable client and engagement acceptance procedures, including independence and conflict of interest checks and, where applicable, audit committee approval. Where the results thereof are negative, we will notify you promptly.

KPMG International and its related entities provide no services to clients. No member firm has any authority to obligate or bind KPMG International, any of its related entities or any other member firm vis-à-vis third parties, nor does KPMG International or any of its related entities have any such authority to obligate or bind any member firm.

If you would like to know more about how KPMG AG processes personal data, please read our Privacy Policy, which you can find on our homepage at www.kpmg.ch.

© 2023 KPMG AG, a Swiss corporation, is a subsidiary of KPMG Holding AG, which is a member firm of the KPMG global organization of independent member firms affiliated with KPMG International Limited, a private English company limited by guarantee. All rights reserved.

Document Classification: KPMG Public