

Family office consulting services brochure

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Why a family office?



Privacy and growth

- Discreetly manage family wealth and affairs
- Act as a gatekeeper between the family and third parties
- Enhance harmonious family growth
- Maintain family value and family governance



Highly personalised services

- Provide bespoke services tailored for the family that differ from those of wealth management institutions and multi-family offices
- Excel at responding to and anticipating the needs of the family



Wealth protection, inheritance and accumulation

- Comprehensively manage philanthropy, estate planning, tax and family wealth distribution
- Handle strategic asset allocation, wealth protection and succession and long-term prosperity
- Carry out duties professionally, increase compliance and reduce risk

Family office setup blueprint

Identifying the purpose

- Define family value - Define family vision and expectations
- Specify current and future beneficiaries
- Specify the portion of the family's wealth managed by Family Office
- Outline scope and functions of the family office
- Understand the philosophy behind philanthropy

Structuring and set up

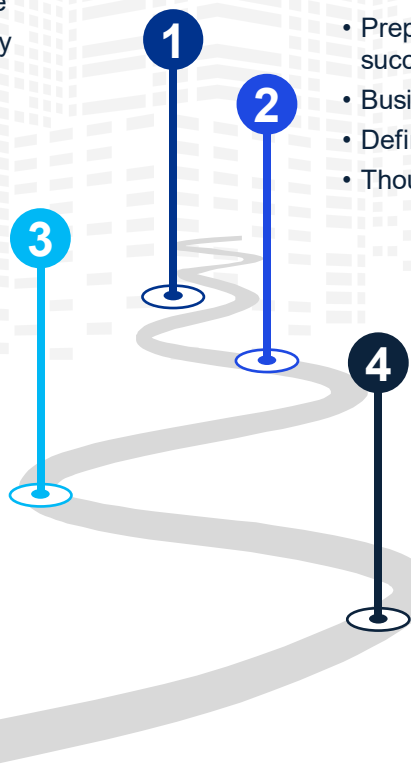
- Create strategic asset holding structure (which may include setting up Trust), taking into consideration of asset protection, succession, control, tax and regulatory requirements
- Develop investment policy
- Structure family board and drafting of family governance documentations
- Create effective communication channels for family members
- Build philanthropy framework and management control methods
- Establish technology, key functions and organizational oversight
- Establish key procedures and internal controls
- Recruit talent and appointment of key roles

Planning

- Determine the most suitable location
- Family board and family governance planning
- Preparation for NextGen's education, growth, development, living and succession
- Business rules on integrating NextGen and family member recruitment policy
- Defined roles and functions of executive and non-executive family members
- Thoughtful resourcing (insourcing vs outsourcing)

Start

- Strategic asset allocation based on investment policy and strategic asset holding structure
- Finance management and control system, wealth management dashboard
- Philanthropy implementation
- Produce investment performance analysis dashboard
- Measure investment results against benchmarks



What makes for an effective family office



Prompt response to economic changes and regulatory requirements



Long-term family prosperity and harmony

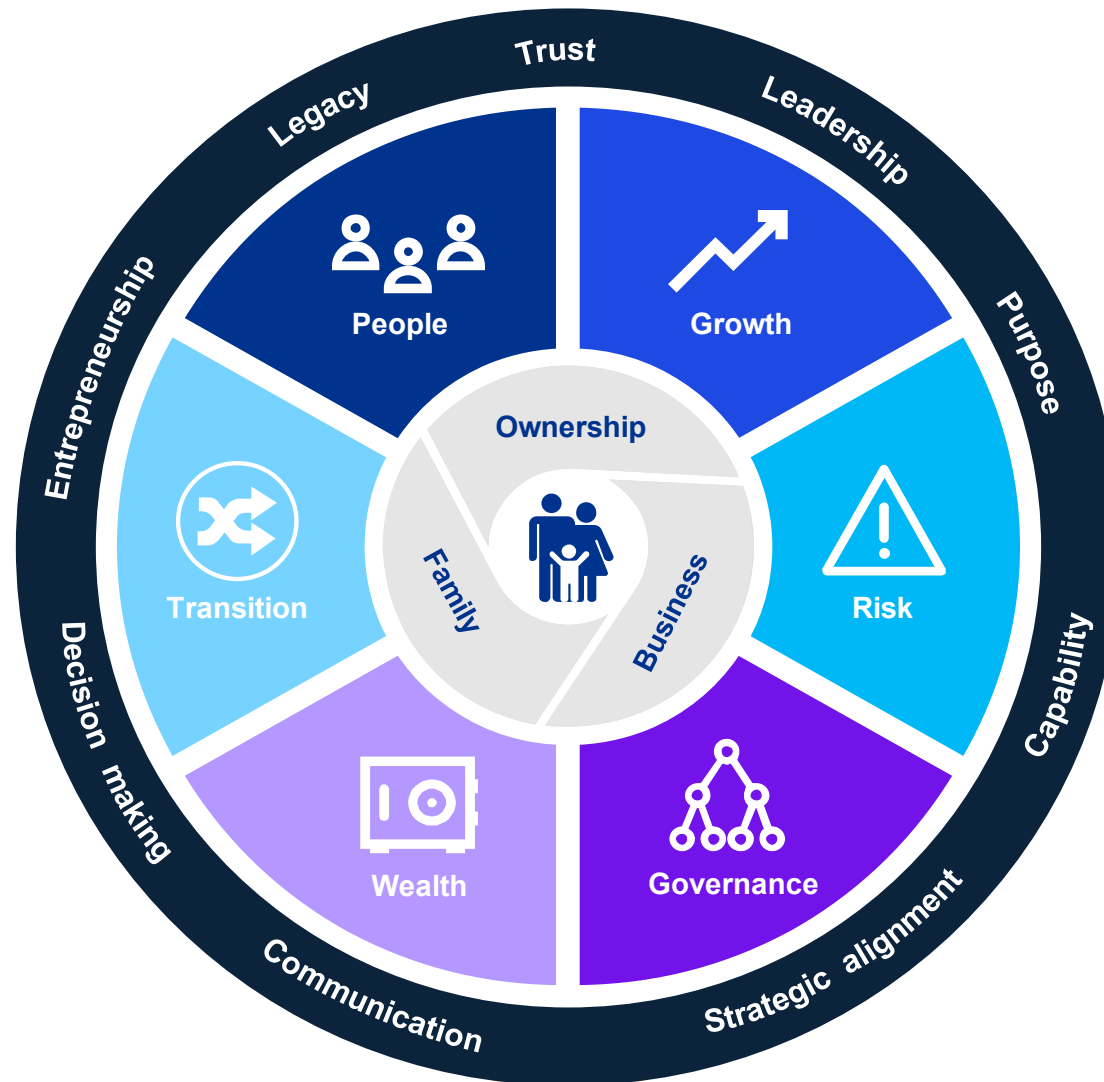


Systematic and robust wealth management protocols



Solutions for the bespoke needs of family members

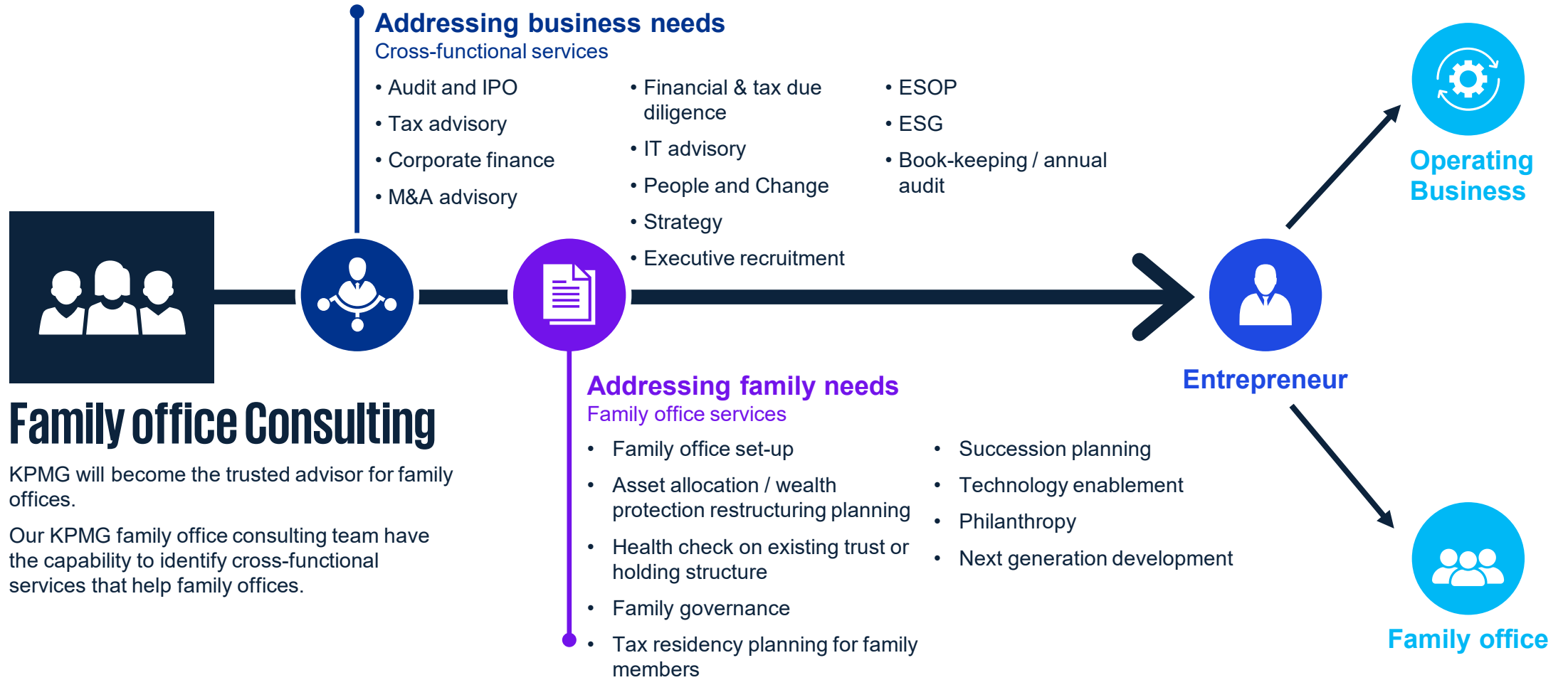
Managing the family business dynamics



KPMG Solutions for Family Office set-up



Our service offerings for family



Contact us

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