



Mid-Market
& Private

Family Office

Your family is unique,
so is our approach.



You and your family have worked hard to build your wealth and legacy. Whether you have just had a liquidity event or are managing intergenerational wealth through your family office, KPMG's services are designed to support you and your family office objectives.

Our vision

We aspire to be the most trusted and comprehensive Family Office adviser, recognised by our clients and the industry for the quality of our independent, objective advice and the profound impact on the lives of our clients and families we serve.

Your framework

The ecosystem an individual or family builds around themselves to manage their financial, business and personal matters is widely referred to as their 'family office'.

Whether it is embedded within your business, separated as a standalone 'single-family' office or part of a 'multi-family' office, KPMG can help build a customised family office, or provide project-specific services.

KPMG Family Office

Our team of dedicated professionals provides independent and objective advice on all aspects of wealth, including financial, business and personal, as our clients navigate their life changes, reach milestones and face moments of transition.

We build deep-rooted relationships based on trust, integrity, and shared commitment. Our approach recognises that every individual and family is unique, and our team across Australia and globally offers personalised advice for every stage of their lives.

Our diverse perspectives and collaborative approach make a world of difference for the many individuals and families we work with, giving them clarity, stability and peace of mind for today and the future.



Case study: checks and balances

An established multigenerational family office felt that over time, the family had become too distant from the family office's operations. They were concerned they did not have clear oversight of the costs, were unsure about whether their risks were being managed, or who were the key decision-makers.

KPMG undertook a thorough review of the family office's procedures, processes and controls, focusing on how investment decisions were made. We uncovered what the family was happy with, and what they wanted to change.

We helped design a new investment process which cut costs and made the in-house operations more robust. We also established a new reporting regime which meant that key stakeholders – both family members and family office management – received the right amount of information as required by their roles.

Our integrated services

Our truly integrated process sets us apart. We bring together KPMG’s deep experience across eight areas:

<p>OUTSOURCED CAPABILITY</p> <p>For when you buy rather than build</p> 	<p>ACCOUNTING, REPORTING & ADMIN</p> <ul style="list-style-type: none"> • Bookkeeping, Accounting and Compliance • Consolidated Reporting • Document Management • Bill Payment Coordination • Admin and Business Support 	<p>OPERATIONAL CAPABILITY</p> <ul style="list-style-type: none"> • Audit and Assurance Services • Technology and ERP Strategy, Integration & Implementation • Financial Reporting • Corporate & Employment Taxes
<p>STRUCTURE AND FORM</p> <p>Minimising leakage</p> 	<p>TAX STRATEGY</p> <ul style="list-style-type: none"> • Tax Planning • Intergenerational Wealth • Acquisition and Disposition Planning • US Cross Border & Int. Tax • Luxury Assets • Structured Giving • Asset Protection • Worldwide Tax Compliance 	<p>ESTATE PLANNING</p> <ul style="list-style-type: none"> • Estate Planning • Complex Situations • Family and Testamentary Trusts • Legacy continuity and preservation • Income Taxes • Philanthropy
<p>DESIGN AND IMPLEMENTATION</p> <p>To fit your office for purpose</p> 	<p>RISK MANAGEMENT</p> <ul style="list-style-type: none"> • Cyber – identify and access management • Cyber – Response • IT environment management • Forensic Data Analytics • Forensic Corporate Intelligence • Regulatory Compliance – continuous monitoring 	<p>DEAL ADVISORY</p> <ul style="list-style-type: none"> • M&A Services • Buy / Sell Due Diligence • Rapid Performance Improvement • Business Succession • Market Analysis • Business Valuation • Debt and Financing Strategy • Restructuring and Optimization
<p>STRATEGY AND PLANNING</p> <p>For a long-term perspective</p> 	<p>DYNAMICS & GOVERNANCE</p> <ul style="list-style-type: none"> • Family Dynamics • Transition and Continuity Planning • Learning and Development • Family Governance • Family Board Advisory • Meeting Facilitation and Retreats 	<p>PHILANTHROPY & IMPACT</p> <ul style="list-style-type: none"> • Strategy • Evaluation • Structure • Learning and Development • Governance and Operations • SRI, ESG and Impact Investing

Case study: across generations

A large international family needed assistance with restructuring their family office operations. The family office was originally embedded within the principal’s main business, supported by the CFO and staff. However, the family came to realise that when the principal is no longer involved in the business, the next generation’s needs and aims will change, and may not be served by the existing structure.

We helped restart previously deadlocked conversations between generations and create a new family office operation from the ground up. We are also in the process of helping build a future generations-focused financial model which will enable them to assess potential impacts of events such as divorce, interest rate changes or tax increases.



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Contact us

For more information and resources, visit [Family Office – KPMG Australia](#) or contact your local leader.

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