KPMG
Private Enterprise

Family office & Private client

KPMG Southern Africa

Business family governance

KPMG Private Enterprise South Africa's certified family governance advisors understand the unique family dynamics, and have a shared goal with you to assist you and your family to put the appropriate governance structures in place to ensure the protection and growth of your family's business(es) and investments making up the family wealth.

How we support your business family

- Support the entrepreneurial spirit of your family to develop long-term growth strategies, to optimize operations and profits.
- Educate the family to understand their appetite for risk, and in turn to manage technological, financial and operational risks. One key focus is to protect the reputation of the family and its assets.
- Structure the family's investments, including the family business and its ownership, for future generations, sustaining family values and the aligned vision of the family. Ensuring clarity of the role of the family and the decision making matrix, goes a long way to maintaining family harmony while growing the family's assets.
- Support with educating and engaging the next generation, and developing a succession plan to ensure an efficient transition of the family wealth, including ownership and management of the operating assets – and where appropriate an exit plan.
- Providing input into the development of family and non-family talent, setting clear roles and responsibilities, and establishing remuneration and employment policies.
- Facilitate forum discussion for family office and family business executives, to share experiences relating to family dynamics and how to work with the dynamics to protect and grow the family business and wealth.



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Our Services

Governance

- Facilitating the family constitution development process, to enable the family to draft a future oriented family constitution.
- Facilitating the development of the legacy plan, which incorporates the succession plan associated with the operating assets, and an Estate plan regarding the family's wealth.
- Facilitating the formulation of the appropriate policies (e.g. family remuneration policy, conflict resolution policy etc.) for the family and the operating business(es).
- Act as an independent non-family role-player in the various family governance structures, e.g. support with drafting the agenda for, and facilitating the Family Assembly/Council meetings.

Structuring

- Assisting with the implementation or review of the appropriate governance structures, e.g. Family Council, Owners' Council etc., aligned with the family constitution and policies.
- Assisting with the following phases to create a family office:


Plan


Design


Structure


Implement


Review

Contact us:


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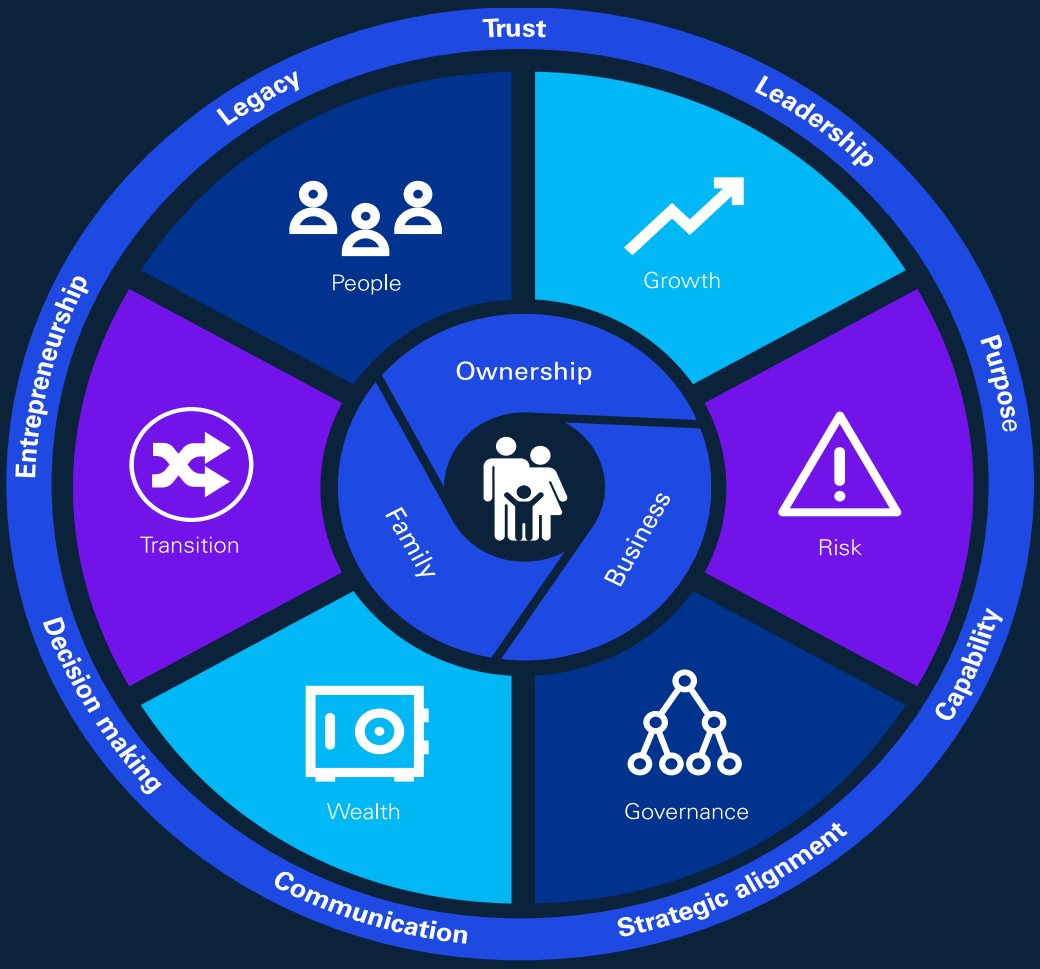
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Business Family Dynamics



Business family governance is an important factor, however, it is not the only factor that supports the protection and growth of your family's business(es) and investments making up the family wealth.

As with your family, your business and wealth doesn't stand still — it evolves. Business families are unique, at the core lies an important dynamic connecting the family with its wealth, including the family business through the family's ownership, offers both opportunities and challenges. Surrounding each decision you may take, are strong family values and a purpose that helps you navigate the journey ahead. KPMG Private Enterprise advisers understand the dynamics of a successful business family and work with you to provide tailored advice — throughout the lifecycle of your family business and the management of the family's wealth.

Our Business Family Dynamics wheel represents the six elements of a strong business family. Our advisers work with business families in areas of growth, risk, governance, wealth, transitions and people to help realize the full potential of the family business and family wealth.

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