KPMG
Private Enterprise

Family office & Private client

KPMG Southern Africa

KPMG Private Enterprise advisers from member firms around the world are dedicated to working with you and your business as the trusted adviser, to determine what is important to you and how to navigate clearly through your challenges – no matter the size or stage of your business.

KPMG South Africa's Family Office and Private Client team (which forms part of KPMG Private Enterprise) understands that every family and their family enterprises and wealth are different. We seek to provide bespoke support customised to you and your family's needs. We advise on the establishment and operation of Family Offices as well as assist individuals, families and family offices operating in all sectors ensuring that the wealth accumulated through success is protected and can grow to support the current and future generations.

By working with KPMG, you gain access to KPMG's global resources through a single point of contact – it is a local touch with global reach.

Family office

No two families are identical and the same goes for family offices.

The way KPMG approaches family, stems from one key insight: that the term "family office" is a flexible concept. There is no single definition, no standard form.

Whether you are thinking about creating a family office for the first time or have a long-established family office, every case requires a unique approach.

That is why, rather than having a set list of family office products, we focus on having a team of specialists who draw on the wider experience from all areas of our global practice to suit each client and their challenges.

How can we help you?

Whether you would like assistance with designing your family office's blueprint or develop its strategy, conduct a health-check on your structures, or just to access expert advice on one particular project or transaction, we have the right people for the job.

We also believe it is important to learn from other family experiences, which is why we created a network for our family office clients and contacts. We invite you to attend events, access thought-leadership and share experiences with other families and senior family office executives.

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Your needs

Establish
Helping families set up family offices that meet their needs

Operate
Oiling the wheels in established family offices

Grow
Setting strategy and providing targeted expertise for different assets

Preserve
Helping established families protect their legacies

One team service offering – a bouquet of services



Strategic Tax Planning | **Business Family Governance** | **Deal Advisory** | **Tech Risk Advisory** | **Privacy Advisory** | **Managed Services** | **Immigration Support**

The approach taken by our KPMG Private Enterprise team is to draw in experts from many different disciplines and give our clients access to their expertise through one contact-point.

Our team of trusted advisors understand that no family offices and their individual high net-worth family members are alike. We take a client centric approach to understanding the complex issues you face, and to provide the required solution driven support – all from one team. With access to our global network, we confidently support you in defining, protecting and building your family's legacy.

Current areas of specialist expertise provided to our clients

- Assurance reviews of operations and governance
- Business intelligence
- Corporate finance
- Corporate governance, regulatory & compliance advice
- Cyber Security
- Due diligence
- Business family governance consulting
- Family governance
- Financial modelling, including the family's wealth
- Financial risk management
- Indirect tax including VAT, stamp duty and Customs & Excise.
- Internal audit strategic sourcing
- Technology advisory services
- Management consulting and operating model design
- Partnerships and joint ventures
- Tax and structuring advice – domestic and international, including transfer pricing.
- Private client advisory
- Tax compliance
- Business accounting, bookkeeping and payroll
- Statutory and non-statutory audit
- Structural reviews
- Technology reviews, sourcing and due diligence

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“Passion is what drives entrepreneurs, fast-growing companies and family businesses alike. It is also what inspires KPMG Private Enterprise’s trusted advisers to support you drive your success.”

- Creagh Sudding - Lead: Family Office & Private Client

kpmg.com/socialmedia

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