

Deloitte.
Private



The thriving family enterprise
Leading with purpose

The what

What is needed to help build a future-proof family enterprise?

Family enterprises represent the interconnected interests of family, ownership, and business. **The ones that thrive lead with a purposeful approach**, raising the bar to achieve financial success and meet personal, social, and legacy goals. How prepared are you to tackle the challenges ahead?

More than ever, **trust**—within your family, business, and society—is an integral part of family enterprises and the **values** they exhibit.

Your **legacy** is tied to your family enterprise's **vision** for tomorrow, and your success depends on navigating the unique dynamics of your family and business.

From governance to multigenerational planning, navigating risk to unlocking your competitive advantage, **it's time to accelerate** your growth, capital and wealth potential.

Our 360-degree approach for future-proof family enterprise



The why

Why is Deloitte Private the right choice?

Deloitte Private guides family enterprises to thrive across generations by navigating the connected facets of family, ownership and business. We understand that **purpose** is at the centre of all that you do—**fuelled by trust, a strong vision, your legacy, and core values**. We know you're focused on growing and protecting your family enterprise well into the future.

We're here with you every step of the way—from the growth and evolution of the business through to sale or succession, and from the development of family and business governance structures to the creation and management of a family office.

Our global network of practitioners brings you the breadth of Deloitte's experience to help you **navigate the ever-expanding complexities of—and opportunities for—your family enterprise**. Together we can define what you want to achieve, and then develop tailor-made solutions to help meet your family and business objectives in order to **realize lasting success**.

The how

How can Deloitte Private help you?

With 175 years of experience serving family enterprises in more than 140 countries, Deloitte Private brings multidimensional perspectives—a **360-degree view**—on the myriad challenges and opportunities that may arise with your own legacy endeavour.

Our **multidisciplinary** and **purpose-led approach** ensures that we bring the right solutions to you at the right time, through the holistic lens of your specific family-enterprise issues and dynamics.

Through our **Global Family Enterprise Centre of Excellence**, we bring together our international network of trusted advisors, leading practices, sector knowledge, and digital tools to develop world-class, bespoke solutions, and data-driven insights.

Our people bring not only their deep experience and **connections to other family enterprises**, but also the full Deloitte organization to you.

With 175 years of experience serving family enterprises in more than 140 countries, Deloitte Private brings multidimensional perspectives—a 360-degree view—on the myriad challenges and opportunities you might face as a family enterprise.



Our global family enterprise approach addresses your most pressing issues using a 360-view



Governance

- How do we achieve family harmony and positive business performance? **Family- and business-governance structure and practices, family council**
- Do we have a clearly articulated and understood purpose for our family enterprise? **Vision, and family constitution and agreement**
- How do we structure our business to meet family and business objectives? **Business-ownership structure, management incentives, exit planning**
- How do we establish transparency and accountability to manage family dynamics through good and bad times? **Decision-making responsibilities and authorities, communication and dispute resolution**



Multigenerational

- How do we ensure the successful transition of business and ownership for both family members and non-family across the generations? **Continuity planning, succession planning, conflict management**
- How do we support and guide our rising generation so that they succeed in their chosen endeavours? **Next-generation development and education**
- How do we engage and empower the next generation of family and non-family employees? **Future management structure**



Risk

- How can we build and protect the reputation of our business and family? **Reputation management**
- How do we prepare for and navigate unforeseen challenges? **Crisis management, physical security**
- How do we use technology safely? **Cyber risk**
- How can we comply with the requirements of every country in which we reside, invest, or own property? **Regulatory compliance**



Competitiveness

- How do we reimagine our business to harness the power of technology? **Digital transformation**
- How do we keep our organization lean, do more with less, and improve productivity? **Business transformation, operational excellence, cost reduction, organic growth**
- How do we get relevant, timely information to make informed decisions? **Data analytics**
- How do we attract and retain the best talent inside and outside the family? **Human capital and organizational design, culture, workforce of the future, incentives and rewards**



Wealth

- How do we create wealth outside the business? **Family-office design and management, wealth management and education**
- How do we serve our community and contribute to causes that are important to our family? **Philanthropy, social impact**
- How do we align family members' investment strategies with our overarching family values and build a resilient portfolio? **Investment strategy, asset diversification**
- How do we optimize tax position across jurisdictions? **Tax effectiveness**
- How do we protect and structure our wealth to meet our objectives and mitigate uncertainty? **Estate planning, legal agreements**



Capital

- What capital needs will our family and business face in the short and long term? **Access to capital**
- How do we manage cash and debt to withstand market downturns and capitalize on market opportunities? **Cash management, liquidity planning**
- How do we set up and manage statutory obligations efficiently? **Tax structuring, accounting operations, forensics**



Growth

- How do we anticipate and plan for growth-disruption and competition? **Innovation and ecosystem**
- How do we ensure our family and business are positioned for success and will achieve our purpose? **Family and business strategic planning**
- How do we make the right inorganic growth choices? **M&A life cycle, acquisitions and divestitures, transactions, and exit planning**
- How do we see, find, and access global opportunities? **Expansion, offshore investments**
- How do we continue to meet our customers' needs? **Customer experience, market sensing**

Contacts



Mohamed Sheibani
Partner, National Family Enterprise Leader
Deloitte Canada
msheibani@deloitte.ca



Michelle Osry
Partner, Family Enterprise Consulting
Deloitte Canada
mosry@deloitte.ca



William Chou
Global Family Enterprise Leader
wilchou@deloitte.com.cn



Bela Grover
Global Family Enterprise
Center of Excellence Leader
bgrover@deloitte.com

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