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Private Wealth Services

Your values, goals and priorities; our focus.

In a nutshell

Business families face constant challenges that affect the success of their business empire.

Success needs support. A dedicated advisor will be able to support you, your family and your business on your journey of value creation and wealth preservation to ensure your legacy is passed on through generations to come. We strive to understand your situation, your aspirations and the people you care about. Be it conversations on complex family issues, wealth preservation strategies or face-to-face discussions on family business succession planning, we listen and are responsive and dependable.

We are committed to building a long-lasting and trusted relationship with you to ensure a sustainable future for your business.

A unique range of services

Your Private Wealth Services advisor will be backed by a global team of specialists, with expertise that covers all your personal and business needs, both locally and globally. We look beyond our traditional service offerings to provide you with the right mix of multi-disciplinary solutions, helping you turn your aspirations into reality.

Wealth Succession Advisory
- Estate planning
- Family business succession planning
- Onshore and offshore asset protection structures

Tax Advisory
- Private companies tax planning and compliance
- Cross border estate tax planning

Family Dynamics Advisory
- Family governance creation
- Family constitution

Philanthropy Advisory
- Charitable trusts and foundations
- Tax exempt status application

Family Office Services
- Family office design and setup
- Family education and communication

Our Methodology

Analyse
- Evaluate your needs, goals and objectives
- Create an inventory of your asset and business holdings
- Understand family dynamics

Plan
- Conduct feasibility study
- Design new optimal structure / update existing structure
- Design and prepare instructions for legal instruments

Implement
- Establish asset protection structure
- Work with legal professionals to prepare legal instruments
- Migration of assets into the structure

Review
- Periodical reviews to ensure plan is in line with goals
- Revise plans to cater for changes in wishes, circumstances and objectives

Introducing your Deloitte team

Thin Siew Chi
Private Wealth Executive Director
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Siew Chi is an Executive Director at Deloitte Malaysia's tax practice and has more than 14 years of experience in both corporate tax compliance and tax advisory work. Her tax advisory experience includes advising on various financial and business transactions, international tax planning on cross-border transactions (inbound and outbound investments), structuring of mergers and acquisitions, group restructuring exercises and tax due diligence work. Siew Chi also leads Malaysia's tax practice in serving business owners, family groups and high net worth individuals in areas including succession planning, international tax, estate planning and wealth preservation.

Chris Foong
Private Wealth Director
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Chris is a Director at Deloitte Malaysia's Private Wealth Services and has been in the estate planning industry since 2004. He is a member of the Society of Trust and Estate Practitioners and a Certified Financial Planner. His expertise is in the structuring of estate plans for various circumstances using both onshore and offshore vehicles and multi-generational wealth planning particularly for high net worth individuals and families.

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