

Challenges in Advising Business Families

Practical Considerations

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ADVISERS

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20 YEARS IN PRACTICE



Contents

- Governance
- Confidentiality & Trust
- Inter & Intra generational tensions
- Demands of Trusted Advisers



CHALLENGES FACED

Governance & Organisation

- General lack of governance
- Organisational issues commonly faced with entrepreneurs
- However, have noticed a shift in this in last few years in Asia (particularly as businesses mature)

Confidentiality & Trust

- Culture of confidentiality
- Building Trust



Inter & Intra generational tensions

- Control of assets
- Control of business / business direction
- Succession issues (formality of structure, communication)





Demands of Trusted Advisers

- Expectation of knowledge
- Expectation of time commitment
- Playing the role of psychologist

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