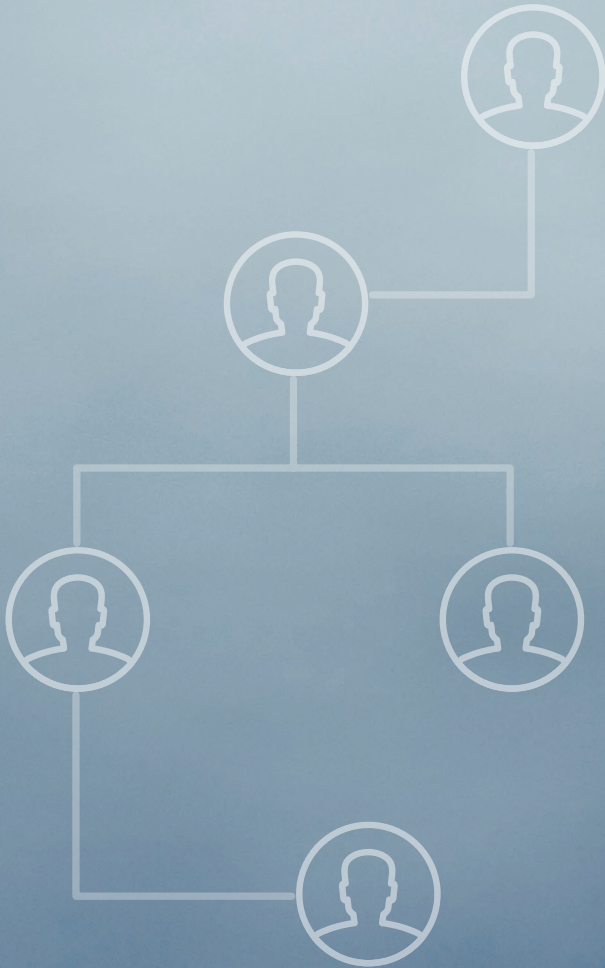
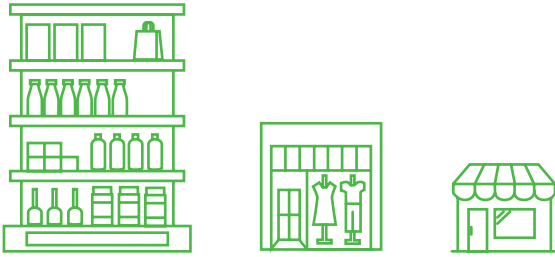


Family businesses – the backbone of the Australian economy



FAMILY OFFICE SERVICES OVERVIEW

Trusted advisers to family businesses for the management of tax, wealth transfer, risk management, lifestyle and family financial reporting needs.



At RSM, we have been working with family businesses of all sizes for close to a century and understand they are the backbone of the Australian economy. All of our senior partners have worked with and in family businesses throughout their careers.

As a trusted adviser to family businesses we act as the central hub for the management of your tax, wealth transfer, risk management, lifestyle and family financial reporting needs, ensuring that decisions and professional relationships necessary to safeguard and grow your wealth are centrally managed and coordinated.

Yet, while we provide deeply personal service based on long-term relationships with our clients built on mutual trust, we also have the scale as part of a large international accounting and consultancy network with over 740 offices in 115 countries globally.

This ensures we can deliver the insights, services and resources to assist you to manage your affairs effectively. We believe that when our clients trust that we fully understand what's important to them and back it up with genuine personalised counsel and support, they are more confident in the choices they make.

Importantly, we understand how important it is for families to simply get along. One of the greatest challenges confronting families looking towards intergenerational wealth transition is ensuring the family communicates effectively. In doing so, a family succession plan can be put in place and the family can identify the skills required for future leaders.

At RSM, we can partner with families to provide advice on areas like succession planning and structuring as part of our end-to-end family office service offering and we do it cost effectively. We help you answer the complex questions and navigate areas of concern including:

- What are the advantages of a family office and when is the right time to establish one?
- Are the important decisions well informed and built on achieving successful outcomes rather than emotion?
- How will the financial legacy of the family remain in place and grow?
- Are risk factors being suitably regarded and managed?
- Are the right tools and platforms in place to provide the required oversight necessary to provide comfort?
- What level of education and buy-in is required of family members, and how can an effective Family Charter be developed?
- What additional skills and capabilities need to either be developed within the family unit or outsourced?

Moreover, our family office offering is not one size fits all. Like family businesses, no two families are the same, so we tailor our approach for individual families. Clients can take a modular approach and utilise individual parts of our service offering. Whether it's legal, wealth advisory, investment analysis, accounting and taxation or succession planning, families can pick and choose what best suits their individual circumstances. Core areas of focus in our family office offering include:

- Accounting, Financial Consulting & Taxation
- Governance
- Wealth Advisory
- Succession and Estate Planning
- Concierge Services
- Legal Advisory Network
- Philanthropic Advisory



For every family office client, we build a bespoke team drawn from the various skillsets available at RSM, led by one of our most senior Partners. We match your family office needs with the right skills and the right people internally, to ensure you have access to the best advice and have complete confidence in the outcomes. We will also draft in external experts from our wide networks on specialised projects as required, whilst we serve as the central accountability and coordination point for the family.

All of this is reflective of our core branding promise – the power of being understood. We spend the time to understand the complexities of each and every family we work with to ensure the best possible advice, strategy and outcomes.



For more information please contact one of our advisers at www.rsm.com.au/family-office-services-sydney

THE POWER OF BEING UNDERSTOOD
AUDIT | TAX | CONSULTING

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