Business Families in Transition

3.00pm Webinar

- What are the main challenges that HNW and UHNW families face during the transition of business and wealth to the next generation?
- How can wealth advisors help families navigate the complexities of cross-border estate planning given the global nature of many UHNW families' assets?
- What innovative strategies can wealth management firms employ to engage both the outgoing and incoming generations during a wealth transition?
- In what ways are digital technologies reshaping the landscape of wealth management and succession planning for UHNW families?
- How important is it for wealth management firms to understand the cultural and familial dynamics of HNW/UHNW families when advising on wealth transition?
- Can you discuss the role of philanthropy in wealth transition planning for HNW and UHNW families? How can advisors encourage and structure philanthropic efforts?
- What are the best practices for wealth management firms to ensure compliance and mitigate risks when structuring large-scale wealth transitions?
- How should advisors address the differing investment attitudes and risk appetites between older and younger generations in UHNW families?
- What specific training or expertise should wealth advisors possess to effectively support UHNW families in transition?
- How can family offices be optimized to better manage the transition of wealth and preserve family values over generations?
- “Succession planning in a family business is a design process”: what does that mean?
- How do you develop leadership in the rising generation?
- Family constitutions are a well-known and popular tool, but how do you hold family members accountable to the family constitution (or governance structure)?
- How do you work with a very controlling patriarch? How do you get them to be willing to look at working on the family culture?

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4.00pm Webinar Ends