friend
Accounting For Growth

Family Wealth Forum

Structuring, Protection and Succession

FAMILY WEALTH – THE CHALLENGES

Having built up your successful business you know that success brings with it certain problems and challenges as well as opportunities. These are the same whether your family business is a trading company, an investment business or even a property business.

As well as continuing to build on your hard work and achievement, you are also faced with other difficult matters. These include:

- **Preservation and protection of your family's wealth whilst continuing to allow it to flourish.**
- **Succession planning for the family business and future generations that is in line with your wishes.**
- **Building in protection for the family's wealth both in the present and for the future.**
- **Planning your Will and your estate to make sure that the wealth you have created is taken care of in accordance with your wishes.**

Points to ponder

Friend Partnership understands that dealing with these issues involves much more than careful accounting and tax planning. It often involves sensitive issues surrounding current and future generations.

At Friend Partnership we take pride in developing a multi-layered and sound understanding of families, their wealth and businesses together with broader circumstances.

Flexibility is crucial

People and their priorities change. Circumstances change. Governments and government policies certainly change. It is important that your plans are adaptable enough to cope with a variety of changing situations.

- We can advise you on business and investment structuring that will deliver the critical flexibility and versatility that is needed.
- We understand that control of assets should always be in the hands of those most capable and most willing. We can structure asset ownership for the present and for the future to achieve that.
- We will assist you in creating succession plans for your business and planning for your wider estate to make sure that your loved ones are provided for and that family wealth is both protected and preserved for future generations.

Our goal

We aim to provide expert advice and continuous support that will allow you to focus on maintaining and increasing your family's wealth secure in the knowledge that it is shielded and the future is provided for.

As part of the Friend Family Wealth Forum service we can advise on:

- Structuring your business and investment portfolio
- Structuring family company shareholdings
- Inheritance Tax and Estate planning
- Family Trusts
- Will planning

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How can Friend Partnership help?

Since 1986 we have provided advice to successful individuals and businesses. We pride ourselves on the close and long-lasting relationships we have built with our clients.

Our in-depth knowledge of structuring, business succession, tax and inheritance matters means that we can provide you with reliable, flexible

Contact us

If you would like to know more about the Friend Family Wealth Forum, please get in touch with our Head of Tax, David Gillies on 0121 633 2007, or alternatively e-mail him at david.gillies@friendllp.com

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