

**GOVERNANCE & SUCCESSION
FAMILY BUSINESS
FAMILY OFFICE**

3 / 6

WEBINAR SERIES

2 SEP 4:00 PM (GMT + 8) | 1:30 PM (GMT + 5:30) | 3:00 PM (GMT +7)

Regional Talk
India  | **Indonesia** 

MCCARTHY DENNING
PK Wong & Nair.
AZB & PARTNERS ADVOCATES & SOLICITORS
Shearn Delamore & Co
MORI HAMADA & MATSUMOTO

IBDO
ABNR COUNSELLORS AT LAW
PJS PUYAT ACINTO & SAKTOS LAW
ONE LAW OFFICE

5/9/20

1

**GOVERNANCE & SUCCESSION
FAMILY BUSINESS
FAMILY OFFICE**

WEBINAR SERIES

- Governance & Succession *Setting the Scene*
16 AUG 2020 | 4:00 pm (GMT + 8)
- Governance & Succession *Solving the Problem*
27 AUG 2020 | 4:00 pm (GMT + 8)
- Regional Talk **India | Indonesia****
2 SEP 2020 | 4:00 pm (GMT+8) | 1:30 pm (GMT+5:30) | 3:00 pm (GMT+7)
- Regional Talk **Philippines | Japan**
9 SEP 2020 | 4:00 pm (GMT - 8) | 5:00 pm (GMT + 9)
- Regional Talk **Malaysia | Thailand**
23 SEP 2020 | 4:00 pm (GMT - 8) | 3:00 pm (GMT + 7)
- Governance & Succession **Single Family Office**
24 SEP 2020 | 4:00 pm (GMT - 8)

MCCARTHY DENNING
AZB & PARTNERS ADVOCATES & SOLICITORS
IBDO
ABNR COUNSELLORS AT LAW
ONE LAW OFFICE
PK Wong & Nair.
PJS PUYAT ACINTO & SAKTOS LAW
Shearn Delamore & Co
MORI HAMADA & MATSUMOTO

5/9/20

2

**GOVERNANCE & SUCCESSION
FAMILY BUSINESS
FAMILY OFFICE**

WEBINAR SERIES

**Regional Talk
Philippines | Japan**

9 SEP
4:00 PM (GMT + 8)
5:00 PM (GMT + 9)

MCCARTHY DENNING
 AZB & PARTNERS
 ADVOCATES & SOLICITORS
 IBDO
 PK WONG & NAIR
 SHEARN DELAMORE & CO
 MORI HAMADA & MATSUMOTO

5/9/20

3

**GOVERNANCE & SUCCESSION
FAMILY BUSINESS
FAMILY OFFICE**

WEBINAR SERIES

3 / 6


2 SEP
4:00 PM (GMT + 8) | 1:30 PM (GMT + 5:30) | 3:00 PM (GMT + 7)

**Regional Talk
India | Indonesia**


MCCARTHY DENNING
 PK WONG & NAIR
 AZB & PARTNERS
 ADVOCATES & SOLICITORS
 SHEARN DELAMORE & CO
 MORI HAMADA & MATSUMOTO
 IBDO
 A B N R
 COUNSELLORS AT LAW
 PJS
 PUJAT JACINTO & SANTOS
 LAW
 ONE LAW OFFICE

5/9/20


4




Spencer Hsu
Deputy Director
MAS



Zac Lucas
Partner
McCarthy Denning



Shreya Rao
Partner
AZB & Partners



Freddy Karyadi
Partner
ABNR

5/9/20

5

Agenda:

- Business Family Demographics
- Succession Planning
- Governance Planning
- International Structuring
- Domestic Family Office
- International Family Office | Singapore Single Family Office

5/9/20

6



Family Demographics

- Which Generation is typically in control?
- Average number of family members that will succeed to the business?
- How soon do we anticipate succession will occur: 3 yrs | 5yrs | 10 yrs?

5/9/20

7



Succession Planning

- Do families typically transfer the business on death or during lifetime?
- Do families typically structure succession, by use of a trust or other arrangement?
- Are there any Community Property or Forced Heir Clawback concerns?

5/9/20

8



Governance Planning

- Do families spend time creating specific governance frameworks to help the next generation work together?
- Do families take into account best practice corporate governance codes?
- Are governance controls typically contained in a shareholder agreements, corporate constitution or trust?

9



Family Constitution

- Are Family Charters | Constitutions popular?
 - Do they have any legal implications?
 - Are they typically prepared by lawyers, accountants, finance professionals or business school academics?
-

10




International Structuring

- Is it possible to structure succession to a family business using an offshore entity or arrangement?
- What are the main considerations?

5/9/20

11



Domestic Family Office

- Is there demand for domestic Family Offices?
- Which is more prevalent: Multi-Family Offices | Investment Offices | Single Family Offices?

5/9/20

12



13



14

Disclaimer, Copyright and Trademarks

The contents of this presentation shall **not** constitute legal advice, and may **not** be relied on as constituting legal advice. Use of and access to this presentation shall not create or establish an attorney or lawyer – client relationship between the user or viewer and any person, company or law firm that has contributed to this presentation. All liability with respect to actions taken or not taken based on the contents of this presentation is hereby expressly disclaimed. No representation is made that the content of this presentation is error-free.

The use of registered trademarks and associated logos in this presentation is for purely illustrative purposes and is not intended in any way to infer, suggest or otherwise represent an endorsement or otherwise of the contents of this presentation from or by any of the brands represented.

All rights reserved. No part of this presentation may be reproduced, distributed, or transmitted in any form or by any means, including photocopying, recording, or other electronic or mechanical methods, without prior written permission.