Table of contents

Preface

Part 1: Setting the scene

Family businesses and business families Ian Macdonald

Wright Johnston and Mackenzie

Part II: Advising the family business

Your role, relationships and responsibilities Judy Green

> Family Firm Institute Jane Hilburt-Davis Key Resources, LLC

Understanding the family business

Christine Blonder INSEAD

Building a family business advisory team Aron Pervin Jonathan Riley Michelmores LLP

Philanthropy and family foundations Malcolm Burrows Scotia Private Client Group Aron Pervin Pervin Family Business Advisors Inc Part III: Stages of the family business

Establishing and growing the business

Stephen Cutts Rawlinson & Hunter

Structuring the business Joanna Boatfield Andrew Parsons Dixon Wilson

Planning for transfer of ownership Ivan Lansberg Maria Dolores Moreno Lansberg, Gersick & Associates, LLC

Rewarding and incentivising non-family directors and employees Jason Ogelman John Lamb Partnership Ltd

Paul McGrath Withers

Succession, reconstruction and reorganisation

Succession of business Simon Rylatt Boodle Hatfield **Enterpreneurs within the family** Mary Duke Francine R Lee HSBC Private Bank

Preparation of the successor generation

Louise Fisher Family Business Solutions Limited

Management and governance

Managing the business

Ken McCracken Family Business Solutions Ltd Matthew Woods Charlie Tee Withers LLP

Extracting wealth from the business

Outside investment **Richard Brass** Schroders

Sale of the business

LP Peter Grav Cavendish Corporate Finance LLP

Part IV: Tools and vechniques

Dispute resolution Ian Marsh familydr

Estate planning

Managing succession, managing wealth Joan Major Alex Scott SandAire

Protecting the family's wealth Iordan M Atin Hull & Hull LLP James MacBride Landmark Advantage, Multi Family Office Patricia A Robinson Goodmans LLP

About the authors