

Table of contents

Foreword

Clare Stirzaker
Boodle Hatfield LLP

Section 1 – Setting the scene

Understanding the challenges of leading a family business

Justin B. Craig
Research Professor at Bond University and Visiting Professor of Kellogg School of Management at Northwestern University
Catharina Jecklin
Bond University

Defining purpose and values

Catherine Grum
Catherine Grum Consultancy

Theories and models in family enterprise advising

Patricia Annino
Rimon Law
Judy Green
FFI

Section 2 – Stages of the family business

Structuring the family business

Toby Crooks
Katharine Haggie
Hiral Kanzaria
Rawlinson & Hunter

Both IN

Ken McCracken
MFBC

Family businesses on the move: continuity, transitions, exits and family office

Yannick Archambault
Kaajal Prasad
KPMG

Advances in human longevity and the impact upon family businesses transition

Hayden Bailey
Boodle Hatfield LLP

Next generation planning

Matthew Fleming
Stonehage Fleming
Maria Villax
Bedrock

Section 3 – Succession

Preparing for transfer of ownership

Dan Frosh

Senior Advisor, Cambridge Family Enterprise Group

Andrew P Hier

Senior Advisor and Partner, Cambridge Family Enterprise Group

Trusts and Family Businesses:

The ideal succession solution?

Bryony Cove

Jennifer Ridgway

Farrers

Nicola Arnold

Victoria Blackburn

JTC

Extracting wealth from the family business

Russell Prior

HSBC

Selling the family business

Dominic Epton

Nick Mayhew

Rothschild

Katharine Taylor

Alembic Partners

Managing family dynamics:

How to improve communication and deal with conflict effectively

Tony Cohen

Alexandra Sharpe

Kinestra Partners LLC

The family business – options for preventing and dealing with family disputes

Guy Abrahams

Nick Jacob

Daniel Ugur

Forsters

Family businesses and divorce – how best to protect

Katie O'Callaghan

Boodle Hatfield

Sophisticated reputation management for family companies

Victoria Byrne

Lily Kennett

Schillings

Understanding the wealth holder spectrum

Matthew Braithwaite

Wedlake Bell

Gina M Pereira

Dana Advisory

Providing advice on philanthropy: why, when and how to raise giving with family clients

Emma Beeston

Philanthropy Advisor

Beth Breeze

Uni of Kent