

A man and a woman are looking at a laptop screen. The man is in the foreground, looking intently at the screen. The woman is behind him, also looking at the screen with a slight smile. The background is a soft, out-of-focus light color. A large red semi-transparent banner covers the bottom half of the image.

Legacy.

**Linking the past to potential.**



**Serving High Net Worth Families**  
#pwcforfamilies



# Growing your legacy

Families are known for their entrepreneurial spirit, a commitment to community, a focus on long-term strategic thinking that is all deeply rooted in their family's values. This is their legacy. As families move into future generations — whether that is transitioning from one generation to the next for the first time or for the 5th time — enterprising families have unique challenges. Growing their legacy becomes a continuous balance of making decisions for what is best for the family and what is best for their enterprise.



## Educating and inspiring new generations of family enterprise leaders

“This course addresses the challenges facing family enterprises and those responsible for their stewardship and represents a significant commitment by PwC partners and managers. We are honored to work with a professional community who are genuinely committed to being better prepared to contribute to the continuity of family enterprises.”

—Dr. Justin B. Craig, Co-Director, Center for Family Enterprises at Kellogg School of Management

## Who we serve

We serve families, major stakeholders and decision makers in family-owned enterprises across a wide spectrum of size and business types. Our client families span first generation to sixth generation and beyond. We serve the family enterprise — including the business, family office, and foundation—working in numerous industries with operations both domestic and international.

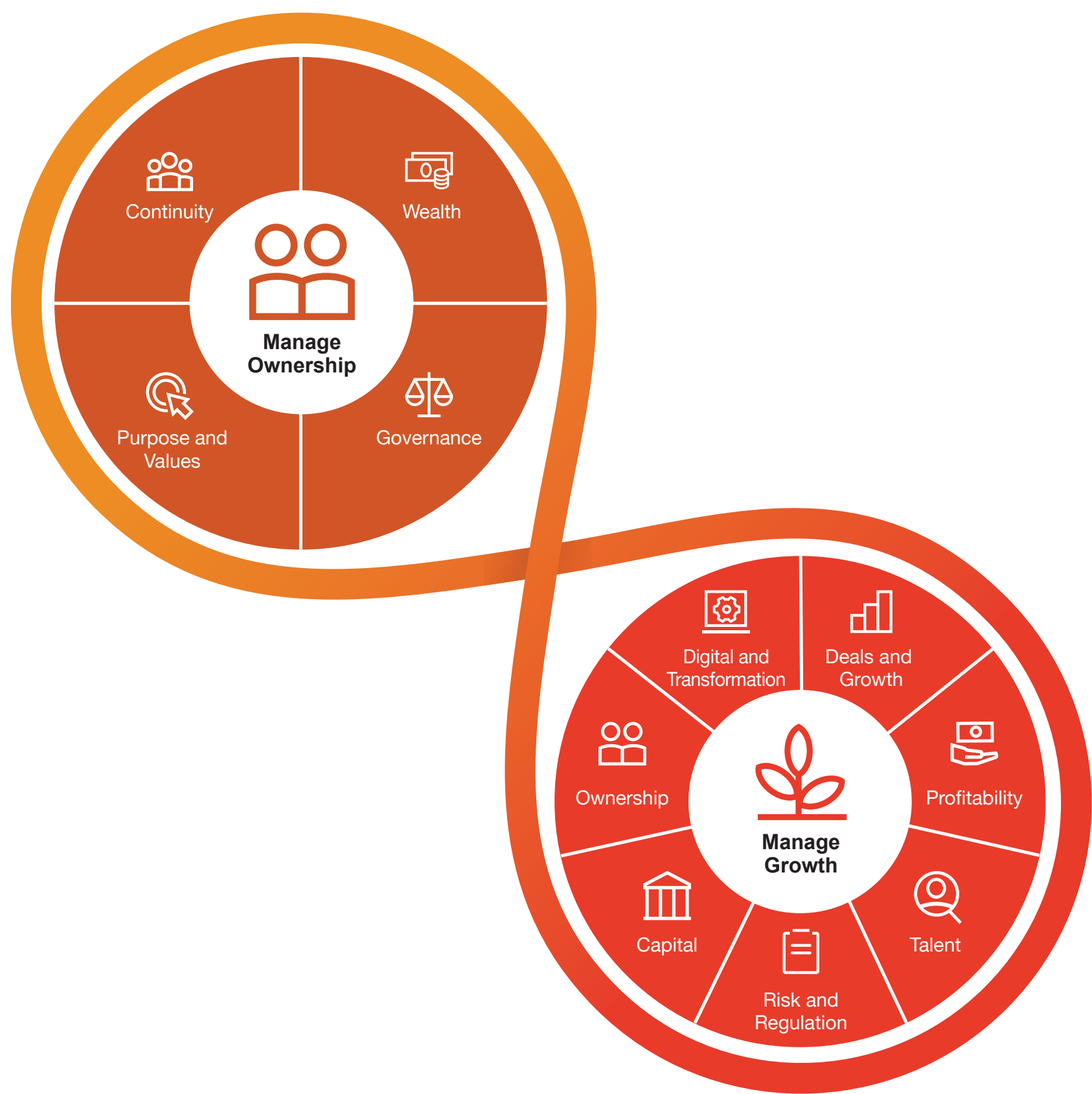
## Who we are

PwC has been serving families and supporting their legacy since our firm's founding more than 170 years ago. Today, we work with more than 3,000 families helping to solve a wide range of challenges they face as individuals, in their business, and in the broader family enterprise.

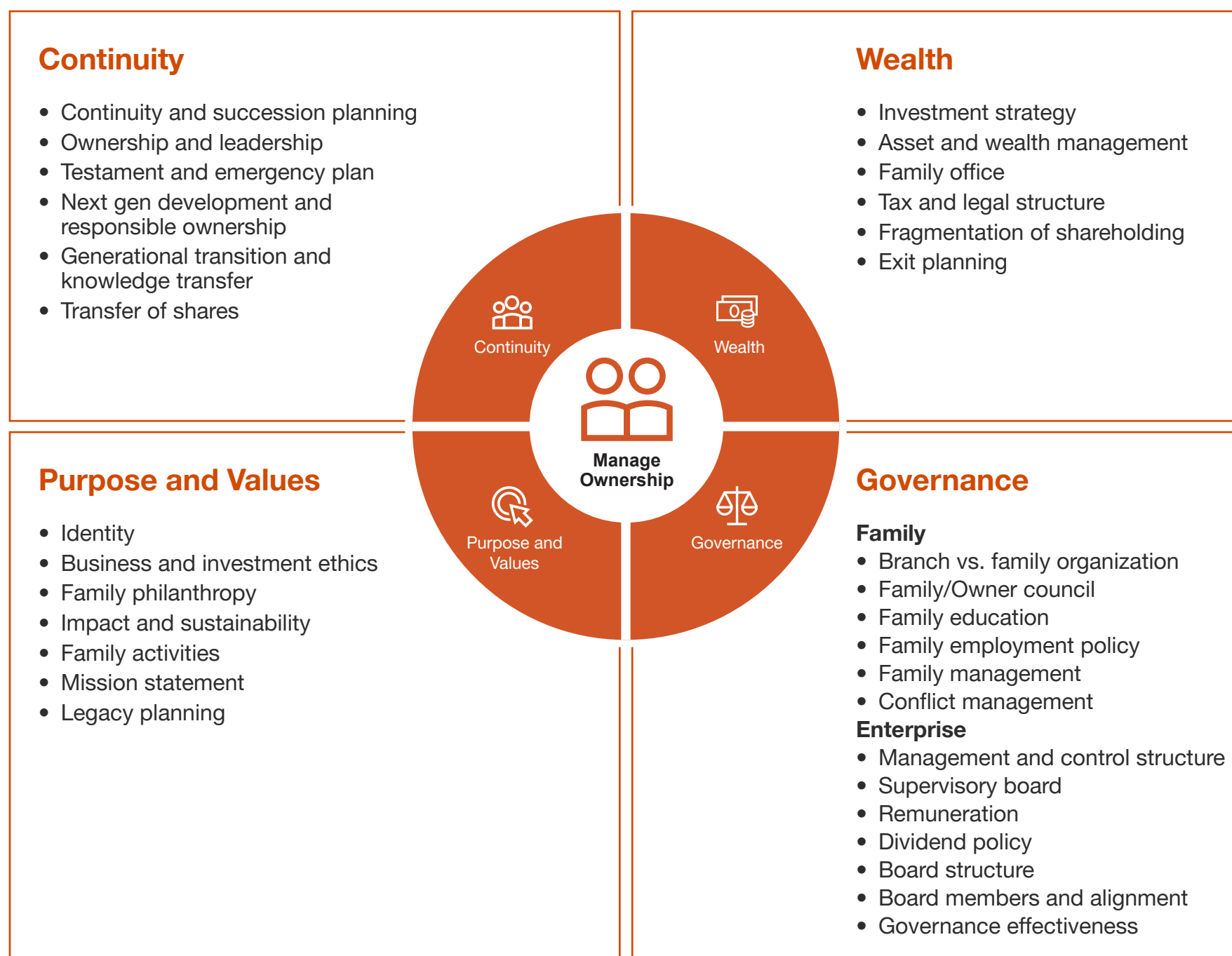
We have more than 2,300 dedicated professionals with deep knowledge and experience serving families, and offer a wide range of services to help families grow their business while protecting their wealth. Our staff are uniquely trained at Northwestern University's Kellogg School of Management Center for Family Enterprise—the same training program that many leading business-owning families send their families for education. As part of the global PwC network, we provide families access to other high net worth families and leading family businesses, top academe, as well as our industry, market and business specialists. We also provide insight and support on deals and technology.

# How we can help

Our team has deep knowledge and experience working with families across all aspects of their family enterprise.



# The Family circle: Manage ownership



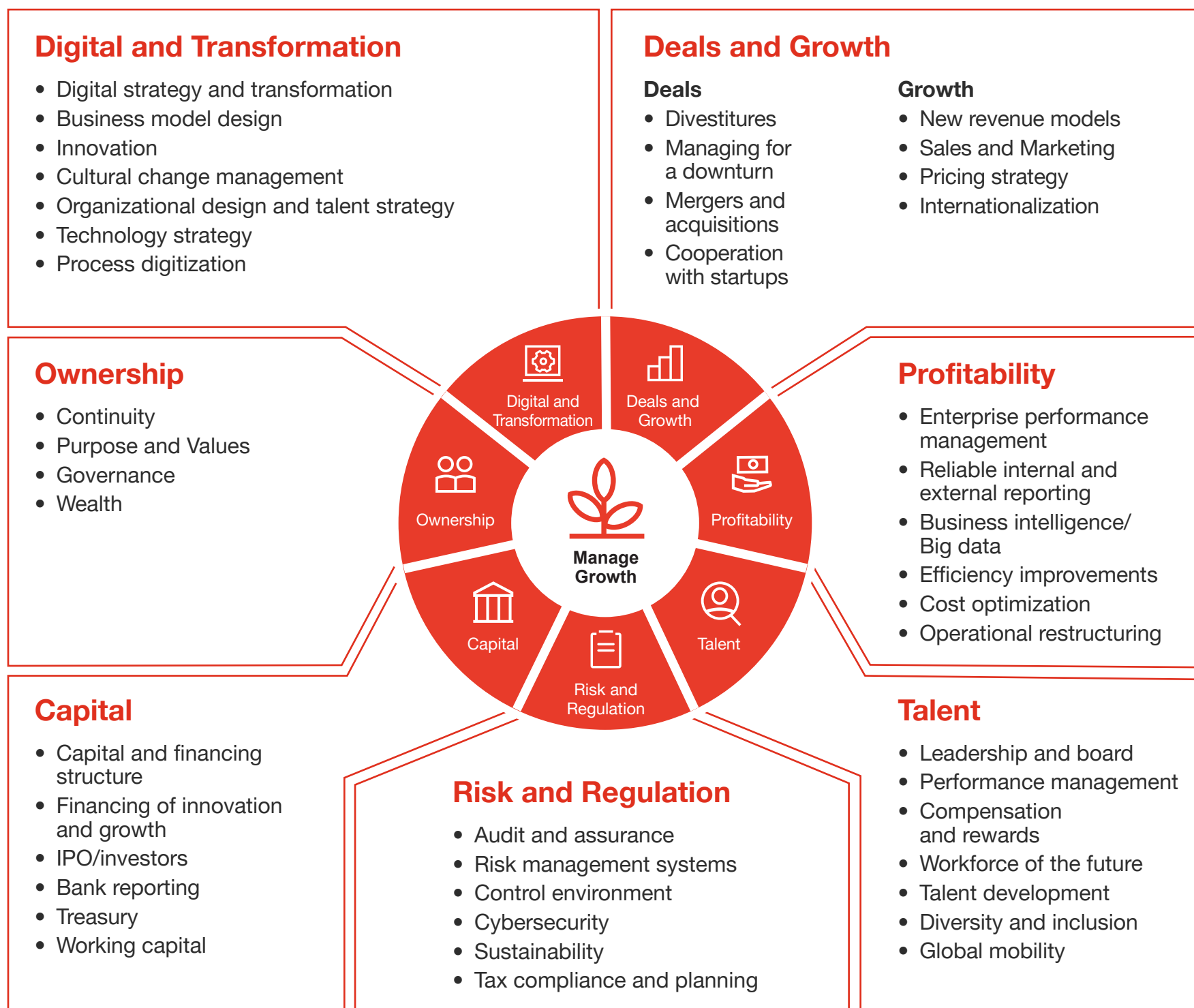
The tax overhaul is the most sweeping since The Tax Reform Act of 1986. It will be a vital year to pay close attention as you shape your **future tax and wealth preservation strategies.**



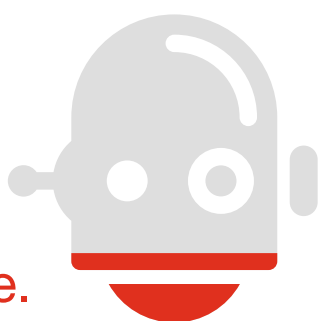
Succession is a breaking point for many family firms, but only **23%** of them have a formal plan in place.

PwC US Family Business Survey

# The Enterprise circle: Manage growth



Only **21%** of family firms prioritize innovation, the bridge to the long-term future.



**42%**

of family firms think they'll establish new entrepreneurial ventures in the next 5 years.



## How we work with the community

We will keep you informed about family enterprise events and activities that may be of interest to you, your family members, or your management team. We sponsor and host key family enterprise events to help families network with their peers and hear each other's stories.

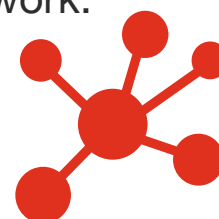
### Family Business Magazine's Transitions Conferences

One of the world's premier family business conferences designed to facilitate important conversations among generations. PwC has been the lead sponsor of Transitions since its inception.



### PwC Family Enterprise Forums

A half-day, invitation-only experience for family enterprise owners and executives. Gain insight into the latest industry perspectives, discuss common issues, share best practices and network.



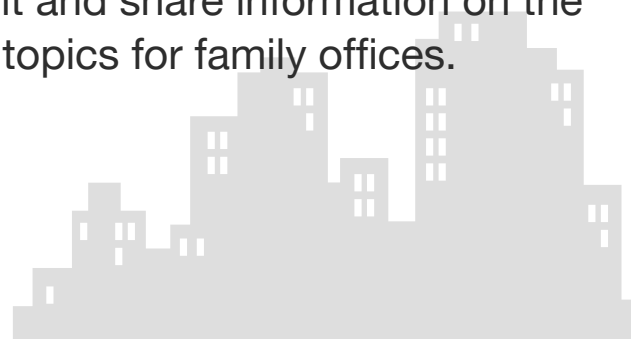
### The Heckerling Institute on Estate Planning

One of the leading educational conferences for all members of the estate planning team, including attorneys, trust officers, accountants, charitable giving professionals, insurance advisors, elder law specialists, wealth management professionals, educators and nonprofit advisors. PwC is a platinum sponsor at their annual conference.



### Family Office Exchange (FOX) Forums

FOX is the world's largest peer-to-peer network for ultra-wealthy families and their family offices. As a FOX member, we present and share information on the latest hot topics for family offices.



### PwC NextGen U: Moving from Next to Now

A multi-year, global leadership development program for family members that have been recently appointed or identified as the future leaders of their family enterprise. It is designed specifically to immerse future leaders into today's dynamic business issues, provide key leadership development, and connect them to a global community that will support their continued growth—helping the “Next” leaders transition to “Now” leaders.



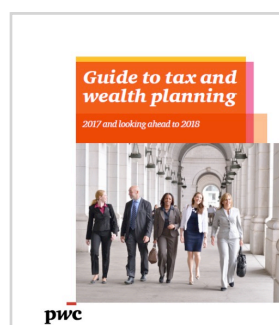
# Thought Leadership

We produce a broad range of reports, surveys, white papers, articles and commentaries on virtually every facet of the family enterprise, all designed to make your world easier to manage. A sampling of these publications follow.



## Family Business Survey

Since 2008, PwC's US Family Business Survey has been providing insight into how US family businesses are meeting the demands of today's marketplace. Our latest survey captures the views of over 2,800 family business leaders in 50 countries.



## Tax and Wealth Planning Guide

Our annual guide covers a broad range of family wealth topics, including information on succession planning, estate planning, charitable giving and updates on tax law changes.



## Next Gen Survey

PwC interviewed next generation family business leaders to discuss how next gens are tackling key issues to ensure success in digital, innovation, social impact, and professionalization.



## Family Business Corporate Governance Series

This 3-part series of white papers covers all aspects of family business governance. Topics include: building or renewing your board, the board's role in family business, and CEO succession planning.

For more information, go to:  
**[www.pwc.com/us/familyenterprises](http://www.pwc.com/us/familyenterprises)**

[pwc.com/us/familyenterprises](https://pwc.com/us/familyenterprises)

**To have a deeper conversation on how we can serve your family,  
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